



KAUFFMAN | KIM, LLP

CERTIFIED PUBLIC ACCOUNTANTS & ADVISORS

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Name(s):

Address:

Social Security Number(s):

If this is your first time filing with us, please bring or send us:

- Social Security numbers for you, your spouse, your dependents
- Copies of last year's tax return for you and your spouse
- Bank account and routing number, if depositing your refund or paying tax directly
- Copies of you and your spouse's IDs (Driver license, Identification Card)

If you filed with us before, please answer the following questions:

- Y N Did your marital status change?
- Y N Are there any changes in your dependents from last year?
- Y N Did you purchase or sell your principal residence or did your address change?

Dependent(s) Information

- Childcare records (including the provider's tax ID number) if applicable
- Income of other adults in your household
- 1098-T form(s)- College educational expenses (Including for you and your spouse if applicable)

- Y N Did you pay over half of the support for a parent or someone else you aren't claiming as a dependent?
- Y N Are all of your dependents either US residents or citizens?
- Y N Did you have any children under 19 (or 24 if full time student) who received more than \$2,200?

Income Sources

Employed

- W-2 form- Wages, salaries, and tips

Self-Employed

- 1099-Misc Form
- Record of all expenses- Contact us if you need an expense report template
- Business asset information (cost and date placed in service)
- Home office, if applicable- Contact us if you need a home office template
- Health insurance payments

Investment Income

- 1099-INT & 1099-OID forms- Interest income
- 1099-DIV form- Dividend income
- 1099-B form- Sales of stock or other property
- 1099-S form- Sales of real estate
- Schedule K-1 form- Income from Partnerships, Trusts, and S-corporations

Rental Income

- Income and expense report
- Rental asset information (cost and date placed in service)

Retirement Income

- 1099-SSA form- Social security
- 1099-R form- Pension/IRA/Annuity income

Other Income

- 1099-G form- State tax refund/Unemployment
- Installment sale information (SSN and address of payer)
- W-2G form- Gambling income
- 1099-C form- Cancellation of debt

Other Information

- Alimony paid or received if divorce or separation agreement was executed before Jan 1, 2019
- Estimated taxes paid for both federal and state
- Income from foreign countries
- Foreign financial accounts with an aggregate value exceeding \$10,000 at any time during the year- Contact us if you do
- Foreign financial assets with an aggregate value exceeding \$50,000 on last day of the tax year or more than \$75,000 at any time during the tax year- Contact us if you do
- Gift from a non-resident alien individual or estate valued more than \$100,000

Y N Did you make any gifts of more than \$15,000 to any one person?

Types of Deduction

- 1098 Form- Mortgage interest
- 1098-E Form- Student loan interest deduction
- 1095-A form- Health insurance marketplace statement
- Health savings account contribution
- IRA, SEP, SIMPLE, and other qualified retirement plan contribution
- Medical and dental expenses
- Gifts to charity
- Classroom expenses for educators K-12
- Investment interest expenses

Any comments: