



Elexza Business Solutions

Financial Solutions for Small Businesses & Individuals

3951 S. Pine Ave, Suite 200 Ocala, FL 34480 ~ 352-620-0150

Individual Income Tax Return Checklist

Personal Information

- Taxpayer & Spouse Driver's License(s)/ID
- Taxpayer & Spouse Dates of Birth and Social Security card(s)/ITIN/ATIN
- Last Year's Federal & State Tax Return (hard copy or PDF)

Dependent (S) Information

- Dates of birth and Social Security numbers or tax ID number
- Child care expense and provider's address and Employer ID number (EIN)/SSN
- Income of other adults in your home
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

Source of Income

- Wage statements (W-2s),
- Self-employment business income and expenses (1099-MISC, schedule K-1, records of all expenses – check registers, credit card statements and receipts)
- Alimony Received/Paid (if divorce agreement was executed in 2018 or earlier)
- Commissions received/paid
- Pension, retirement income (1099-R)
- Unemployment income (1099-G)
- Canceled Debt Amount (1099-C)
- Social Security income (SSA-1099)
- Statements on the sales of stocks or bonds (1099-B)
- Interest and dividend income (1099-INT/1099-DIV)
- Lottery or gambling winnings/losses (W-2G for some winnings)
- State income tax refund (1099-G)
- Rental Income and expenses
- IRA contributions or 401(k) Distribution (1099-R)
- Traditional IRA basis (i.e. amounts you contributed to the IRA that were already taxed)
- Social Security/RRB income (1099-SSA, RRB-1099)

Deductions

- Record of purchase or sale of residence

- Medical and dental expenses
- Real estate and personal property taxes
- Mortgage or home equity loan interest paid (all 1098 series forms)
- Receipts for energy-saving home improvements
- State or local taxes paid
- Invoice showing amount of vehicle sales tax paid
- Estimated taxes or foreign taxes paid
- Cash and non-cash charitable donations
- Amounts of miles driven for charitable or medical purposes
- Job-related educational expenses
- Educator expenses (grades K-12)
- Records of any scholarships or fellowship received
- Tuition and Education Fees (1098-T)
- Student loan interest (1098-E)
- Casualty or theft losses

Proof needed to claim EITC, CTC/ACTC/ODC, AOTC and/or HOH filing status:

- Proof of relationship (child's birth certificate)
- Proof of residence (a letter from the child's doctor/school on letterhead) must include:
 - the child's name,
 - the child's date of birth,
 - the child's address (for the year shown on your letter),
 - the dates the child lived at the same address as you (must be more than half of the tax year),
 - the name of the child's custodial parent,
 - the doctor's or a school administrator's name,
 - the doctor's or a school administrator's signature, and
 - the doctor's or a school administrator's phone number.