

<b>Personal Deductions:</b>		
	2018 Tax Year	Current Tax Year
<b>Income:</b>		
Wages (see W-2)		
Interest Income: (see 1099-Int)		
Dividend Income: (see 1099-DIV)		
IRA Distributions (see 1099-R)		
Pension Income (see 1099-R)		
<b>Adjustments to Income:</b>		
IRA Contribution:		
IRA Contribution (spouse):		
Student loan interest deduction		
<b>Itemized vs. Standard Deduction = \$12K Single / \$24K MFJ</b>		
State and local income taxes paid		
Real Estate Taxes - prinipal residence		
Personal property taxes - non business (car tabs)		
Mortgage Interest		
Mortgage points (refi)		
Tax prep fees		
Gifts to charity - cash or check		
Gifts to charity - non-cash		
Unreimbursed Employee Expenses: (Only deductible on MN Return)		
Business Miles		
Total Miles for the year		
Vehicle Description:		
Other		
Other		
Other		

## Common tax docs to gather for us to prepare your 2019 tax returns:

- Income Items:
  - W-2s
  - 1099-Misc, 1099-R, 1099-B, 1099-INT, 1099-DIV
  - SSA-1099 (Social Security Benefits statement).
  - K-1s (applies to certain businesses, partnerships and trusts).
- Business or Rental Property
  - Income and Expenses (see tax planner worksheets).
- Form 1095-A, 1095-B or 1095-C documenting your 2019 health coverage.
- H.S.A. Plans:
  - Form 1099-SA
  - Form 5498-SA
- Any IRA Contributions for 2019 (you have until April 15, 2020 to contribute for 2019).
- Itemized Deductions:
  - Medical (Prescriptions / Doctors & Dentists / Hospitals & Clinics / Medical Devices / Mileage)
  - Car tabs
  - RE taxes
  - Form 1098 mortgage Interest
  - Charity donations
  - Unreimbursed Employee Expenses (only deductible on the state return)

## Other Items:

- Settlement Statements on the purchase or sale of Real Estate.
- Child Care provider statements for any of your dependents in daycare.
- Tuition Statements – Form 1098-T.
- Student Loan Info. – The federal deduction for interest, and a MN credit up to \$500 also applies. Depending upon your income, you may qualify for the credit.

## Info Needed:

- Form 1098-E showing the interest paid.
  - For the MN Credit – The total you paid toward your own individual student loans in 2018.
  - For the MN Credit – Total amount of your student loans (i.e. the original loan amounts).
- 529 Plan Contributions – Minnesota has implemented a **tax credit of up to \$500** each year. The amount of the credit varies based upon your income.  
\*Info Needed:
  - Plan Trustee
  - Acct #
  - 2019 Contribution
  - Distributions taken from the account (if any)
- Any Major Life Events? Let us know about any significant changes from last year.