



2019

# 2019 Tax Return Checklist

Client Name: .....

	Prior Year	Current Year
<b>Income:</b>		
Wages (IRS W-2) .....	_____	_____
Interest Income (IRS 1099-INT) .....	_____	_____
Dividend Income (IRS 1099-DIV) .....	_____	_____
Brokerage Statements (Form 1099-A,B,S) .....	_____	_____
IRA/Pension/Annuity Income (IRS 1099R) .....	_____	_____
Schedule K-1s (IRS K-1) .....	_____	_____
Miscellaneous Income and Adjustments (IRS-1099-MISC, G) .....	_____	_____
Rent and Royalty Income .....	_____	_____
<b>Itemized Deductions:</b>		
Medical/Dental Expenses .....	_____	_____
Real Estate Taxes .....	_____	_____
Property Taxes .....	_____	_____
Mortgage Interest (Form 1098) .....	_____	_____
Charitable Contributions .....	_____	_____
<b>Other:</b>		
Estimated Tax Payments .....	_____	_____

\* Provide any tax related information not listed above, e.g. new brokerage statements, K-1 investments, etc.





















2019

# Itemized Deductions

TSJ	Description	Prior Year Amount	Information Included (X or ✓)
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## Medical/Dental Expenses:


## Real Estate Taxes:


## Property Taxes:


## Mortgage Interest:


## Charitable Contributions:




2019

# Federal, State, and City Tax Payments

## Refund Application:

If you have an overpayment of taxes, do you want the excess:

Refunded .....  Yes  No  
 Applied to next year's estimated tax liability  Yes  No

## Federal Estimated Tax Payments:

2019 1st Quarter Estimate ..... (Due 04-15-2019)  
 2019 2nd Quarter Estimate ..... (Due 06-17-2019)  
 2019 3rd Quarter Estimate ..... (Due 09-16-2019)  
 2019 4th Quarter Estimate ..... (Due 01-15-2020)

Amount Due	Date Paid (Mo/Da/Yr)	Amount Paid

## State and City Estimated Tax Payments:

2019 1st Quarter Estimate .....  
 2019 2nd Quarter Estimate .....  
 2019 3rd Quarter Estimate .....  
 2019 4th Quarter Estimate .....

TSJ \_\_\_\_\_  
 State/City Name \_\_\_\_\_

Amount Due	Date Paid (Mo/Da/Yr)	Amount Paid

2019 1st Quarter Estimate .....  
 2019 2nd Quarter Estimate .....  
 2019 3rd Quarter Estimate .....  
 2019 4th Quarter Estimate .....

TSJ \_\_\_\_\_  
 State/City Name \_\_\_\_\_

Amount Due	Date Paid (Mo/Da/Yr)	Amount Paid

2019 1st Quarter Estimate .....  
 2019 2nd Quarter Estimate .....  
 2019 3rd Quarter Estimate .....  
 2019 4th Quarter Estimate .....

TSJ \_\_\_\_\_  
 State/City Name \_\_\_\_\_

Amount Due	Date Paid (Mo/Da/Yr)	Amount Paid

2019 1st Quarter Estimate .....  
 2019 2nd Quarter Estimate .....  
 2019 3rd Quarter Estimate .....  
 2019 4th Quarter Estimate .....

TSJ \_\_\_\_\_  
 State/City Name \_\_\_\_\_

Amount Due	Date Paid (Mo/Da/Yr)	Amount Paid