



Checklist of Necessary Documents for your Income Tax Return - 2019

1.) If you are a Homeowner

- W-2 Form(s)
- Interest Income (Saving Account)
- Dividends (Mutual Funds)
- Unemployment Income (Federal and State)
- Gambling Income (Lottery, Casino, etc...)
- Social Security Benefits
- Health Insurance Coverage (1095-A, B, or C)
- Bill of Sale of New Car
- Mortgage Interest
- Property Taxes
- Charity Contributions

2.) If you are Not a Homeowner

- W-2 Form(s)
- Interest Income (Saving Account)
- Dividends (Mutual Funds)
- Unemployment Income (Federal and State)
- Gambling Income (Lottery, Casino, etc...)
- Social Security Benefits
- Health Insurance Coverage (1095-A, B, or C)
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3.) If you are Self-Employed (Contractor)

- 1099 Forms Received
- Total Income From Invoices
- Car Expenses (including Mileage for the Year)
- Parking & Toll (Sunpass) Expenses
- Temporary or Permanent Car Rental/Lease
- Clothing Expenses (If Required For Your Work)
- Cell Phone Expenses
- Meal Costs (For Business Purposes Only)
- School Material Costs (If You Are a Teacher)
- IRA Contributions

4.) If you own Investment Properties For Rent (Includes Air B&B)

- Rental Income
- Repair Expenses
- Cost of Insurance for Property
- Advertising Expenses
- Association Fees
- Commissions Paid
- Utility Expenses
- Mortgage Interest
- Property Taxes

***If you are have a new Dependent for this year, don't forget to bring the Social Security Card and Date of Birth Information of the new Dependent**

***If you bought new Property in 2019, don't forget to bring the Closing Statements**

***If you are a student currently in school, please bring your 1098-T/1098-E**