2019 Income Tax Return

1. Personal Information

Relationship	Legal Name		Date of Birth (MM/DD/YYYY)	Social Security Number (SSN or ITIN)	Occupation
	Last Name	First Name			
Myself					

2. Address & Contact Information - *Address has been Changed ? : Yes ☐ No ☐*

Address			City / State / ZIP
Telephone		E.mail	

3. Check List

*** Have to bring or attach Copy of Prior Year Tax Return**

* Did you pay estimated tax to Federal or State during 2019? If any, scribe paid amount and date =>

* Did you have any health insurance coverage during 2019? => Yes ☐ No ☐

*=> if yes, scribe the period : full year? (☐) **OR** from(month): ' thru(month): '*

* Did you have insurance from Covered California(Obama care) at any time in 2019? => Yes ☐ No ☐

*=> if yes, bring or attach **Form 1095-A** , Health Insurance Maketplace Statement*

* **Bank Information**(Rounting No & Account No or Void Check) for Direct Deposit or Debit

4. Attachments - Copy or Scanned Documents

*** W2's from each employer you worked for**

*** All 1099's received**

- **- 1099-INT for Interest Received**
- **- 1099-DIV for Dividends received**
- **- 1099-S for the sale of Real Estate**
- **- 1099-SSA for Social Security Benefits**
- **- 1099-R for distributions from pensions, annuities & IRA's**
- **- 1099-G For Unemployment or Prior Year State Tax Refund**
- **- 1099-MISC for Independent Contractor payment**

*** Purchase and Sale information for Stock Sales(1099-B)**

*** 1098-T (College Tuition), 1098-E(Student Loan Interest)**

*** Total of child or dependent care expenses**

*** 1098 - Mortgage & Home Equity Loan Interest paid**

*** The amount of property tax you paid during the year**

*** List of charitable contributions made during the year**

*** A copy of your last car registration notice**

*** Total of all medical and dental expenses**

*** etc. : Gambling Winning(W-2G), Other Income,……**

*** This is a inclusive list and not everything will apply to you. Feel free to call us to find out what you will need to bring**

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