

Bring these documents with you. There is no need to write down any amounts from these forms...we will use the original forms to get the necessary information.

1. W2s – wages from your job
2. 1099R – distributions you received from pensions and other retirement accounts
3. 1099G – Unemployment, state tax refunds and other government payments received
4. 1099MISC – payments you received from others that you performed services for or rented property to.
5. 1099INT – interest received from banks or credit unions
6. 1099B – This is a statement from your Broker showing interest, dividends and proceeds from the sale of investments held in brokerage account.
7. SSA-1099 – amount of social security benefits received for the year
8. 1095 – Health insurance information
9. 1098-T -If you have dependents in college
10. K-1s – if your have ownership in a partnership or S corporation

Consider whether you will be “itemizing” deductions of taking the standard deduction. The Standard Deduction for 2019 based on filing status:

Married filing jointly	\$24,400
Single or Married filing separately	\$12,200
Head of Household	\$18,350

Unless your deductions exceed the Standard Deduction it is better for you to utilize the Standard Deduction. The major Itemized Deductions are:

Medical expenses which exceed 10% of your adjusted gross income

Property taxes – on your home, vacation home and other property. Also, license plate fees for any vehicles you own

Mortgage interest

Donations and contributions

Consider whether your amounts paid for the above will exceed the Standard Deduction.

If you pay Child Care for your dependents then bring the following information for each provider of Child Care:

Name, address, taxpayer identification number (SS# or FEIN) and amount paid for the year.

If you have any questions or concerns about what you should bring to us to prepare your taxes please call us at 517-278-2261 or email wkurtz@carlsonacctg.com.