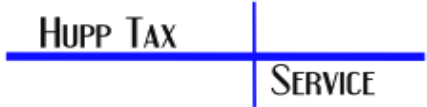


# What to Bring



tax year 2019      www.hupptax.com

32341 Vine Street, Willowick, OH 44095    ph: 440.944.4343    fax 440.944.4341    email: taxhelp@hupptax.com

Name: \_\_\_\_\_

- Anything marked "Important Tax Document"
- W2s, 1099s, etc. (showing income)
- 1098s & 1099s (showing deductions, payments, etc.)
- 1098-T for students. (REQUIRED for education credits)
- 1095-A (Marketplace health insurance)
- Prior year tax return (if not prepared by Hupp Tax)

**Changes during 2019:**

Moved (when?) \_\_\_\_\_

Moved (where?) \_\_\_\_\_

Did you get (circle) : Married/Divorced/Separated?

If so, when? \_\_\_\_\_

Add / Lost Dependent \_\_\_\_\_

- Quarterly Estimates (please specify if any amounts below were applied from prior year)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
Federal payments					\$
Ohio payments					\$
City (RITA, CCA, Euclid, etc)					\$

- Self-Employed / Rental Property information:

Summarize income and expenses on separate sheet (if needed, see worksheets at hupptax.com)

- Home office - only if an area is regularly & exclusively used for business.  
If so, include sq feet of office; use simplified method rate (\$5/sq ft) OR actual home expenses
- List equipment purchases and capital improvements separately. List dispositions separately.
- Remember your mileage log including year-end odometer reading, if you want to deduct your mileage!

## Some Key Changes for 2019

- IRS redesigned Form 1040; rearranged lines, removed Schedules 4, 5, and 6
- Taxpayers now must include date of divorce if reporting Alimony (paid or received)
- Medical expense threshold increased from 7.5% to 10% on Federal tax returns.

## Common Tax Breaks - (continued on back)

- College Tuition - The student's 1098-T is REQUIRED.

Student's status as of 1/1/19 (i.e., freshman, etc)	
Other required educational fees, <b>BOOKS</b>	\$
How much tuition was /will be reimbursed by an employer, etc.	\$

## Common Tax Breaks (continued)

- Health Savings Accounts (HSA)** - A great tax saving tool! Please include the 1099-SA.

Amount contributed (max. \$3500 Single, \$7000 Family, add'l \$1,000 catch up if over 55)	\$
Was any HSA distribution NOT used for qualified medical expenses?	non-medical amount \$

- IRA contributions** - max. \$6,000 (\$7,000 over age 50)

	Owner	Amount	Owner	Amount
Traditional		\$		\$
Roth		\$		\$

- Child Care Credit** - Expenses paid for day care in order to work or attend school

Provider Tax ID, Name & address:	
Amount spent per child: child name _____ Amount \$ _____	

- Medical Expenses** - Total expense must be over threshold before any deduction.

*Note two different thresholds for 2019: Federal 10%, Ohio 7.5%*

\*\*\* If medical expense exceeds 7.5%, it can help on the Ohio return, even if it doesn't on the Federal return.

Health Ins. premiums (not through payroll)	\$
Prescriptions	\$
Dentists, Doctors	\$
Hospitals, Labs	\$
Long Term Care Insurance	\$
Eyecare: Contacts, glasses	\$

Other	\$
Other	\$
Miles driven for medical	\$

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## Itemized Deductions - Itemizing will help if deductions are more than your standard deduction.

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**Standard deduction amounts: Single \$12,200, Married \$24,400, Head of Household \$18,350**

- additional standard deduction of \$1,650 (single) or \$1,300 (MFJ, HOH) if 65+ years and/or blind.

- If you're uncertain, fill in the amounts and we will determine whether you should itemize.

- Mortgage Interest & Property Taxes**

Please note amount paid (unless already included on form 1098.)	Interest	Property Taxes
	\$	\$

- Charitable donations** - IRS requires receipts for ALL donations

### Cash/Check Donations

Church	\$
Other	\$
Other	\$

### Non-Cash Donations \*

Goodwill	\$
Purple Heart	\$
Other	\$

\* If over \$500, additional detail required; itemized list, value, etc

- Gambling losses** (not to exceed gambling winnings)

\$
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