



TAX PREP CHECKLIST – TAX YEAR 2019

Personal & Family Information

<input type="checkbox"/>	Your <u>Social Security number</u> or <u>ITIN</u> (including you, your spouse and dependents)
<input type="checkbox"/>	Your <u>full name</u> and <u>date of birth</u> (including you, your spouse and dependents)

Sources of Income (*If Applicable)

<input type="checkbox"/>	All W-2 Forms for you and your spouse
<input type="checkbox"/>	1099-Misc Forms
<input type="checkbox"/>	Rental property: Summary of revenue & expenses*
<input type="checkbox"/>	Retirement Income/Social Security Benefits (1099-R, 1099 SSA, RRB-1099)*
<input type="checkbox"/>	Savings & Investments (1099-INT, 1099-OID, 1099-DIV)*
<input type="checkbox"/>	Self-Employed: Summary of revenue & expenses*

IMPORTANT 2020 DATES

Date	Deadlines to...
Jan. 31, 2020	Have W-2 Forms mailed out to employees
Jan. 31, 2020	Mail 1099-Misc. forms to your contractors
Mar. 15, 2020	File partnerships & corporate tax returns
Mar. 15, 2020	Request an extension to file (partnerships & corporate)
Apr. 15, 2020	File individual tax returns
Apr. 15, 2020	Pay taxes and request an extension to file (individual)

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