

Income and Deduction Record Keeper
Tax Year 2019

Use the following Income Schedule as a checklist. Please include the documents in the tax material you drop off at our office.

INCOME DATA

Income Sources	Check If Documents attached
Wages: W-2 Forms	
Miscellaneous Income: 1099-MISC	
Interest: 1099-INT	
Dividends: 1099-DIV	
Stock Sales and Cost Basis	
Alimony	
Pensions: 1099-R	
IRA Distributions (Traditional or Roth)	
Savings Bonds Income	
Unemployment Compensation	
Jury Duty Compensation	
Gambling Winnings and Losses	
Other	
Other	

DEDUCTION DATA

Estimated Federal Taxes Paid	Amount	Estimated State Taxes Paid	Amount
Date Paid		Date Paid	
Date Paid		Date Paid	
Date Paid		Date Paid	
Date Paid		Date Paid	
Unreimbursed Medical Expenses	Amount	Gifts to Charity*	Amount
Health Insurance Premiums		Religious Organizations	
Long-Term Care Insurance Premiums		United Way	
Prescriptions		Red Cross	
Eyeglasses, Contact Lenses		Salvation Army	
Medical Supplies		Goodwill Industries	
Doctor		Humane Society	
Dentist		Other	
Optometrist		Other	
Hospital		Other	
Medical Miles		Out of Pocket Volunteer Expenses	
Counseling		Volunteer Miles	
Medical Equipment		Other	
Physical Therapy		*Remember the IRS requires	
Nursing Care Costs		receipts for all donations	
Taxes Paid		Other	Amount
Personal Property Tax: vehicles(s)			
Personal Property Tax: other			
Real Estate Taxes			
Fire District			
Interest Paid/Points			
Home Mortgage Interest			
Mortgage Loan Points			
Home Equity Loan Interest			
Investment Interest			
Qualified PMI Premiums			