

Taxpayer name: _____

Tax year _____

Type	Form	Description	Note	Taxpayer Checklist/Notes
Itemized Deduction	Schedule A	Medical Expenses	Above 7.5% of AGI	
Itemized Deduction	Schedule A	State and Local / Property Taxes	Up to \$10,000	
Itemized Deduction	Schedule A	Interest Expense and Investment Interest	Mortgage Limit \$750k	
Itemized Deduction	Schedule A	Charitable Donations	Up to 50% of income	
Itemized Deduction	Schedule A	Casualty Losses for Federal Disaster Areas	NOT reimbursed by insurance	
Income Adjustment	Schedule 1	Real Estate Rental or Business Losses	Income/Expenses Report. Schedule E or C	
Income Adjustment	Schedule 1	S-Corp or Partnership Losses	Requires form K-1	
Income Adjustment	Schedule 1	Capital Losses	Limited to \$1,500 S or \$3000 M	
Income Adjustment	Schedule 1	Self-Employed Health Insurance		
Income Adjustment	Schedule 1	Student Loan Interest Deduction	Up to \$2,500	
Income Adjustment	Schedule 1	IRA and SEP Deduction	Income and Contribution Limitations	
Income Adjustment	Schedule 1	Foreign Income Exclusions	US person Living abroad	
Income Adjustment	Schedule 1	Health-Savings Accounts	Contributed and paid expenses with	
Income Adjustment	Schedule 1	Educator Expenses	Up to \$250 - Public School Teachers	
Income Adjustment	Schedule 1	Carryover Losses from Previous Years	See last year's return	
Income Adjustment	Schedule 1	Alimony Paid	Divorces in 2018 or before	
Non-Refundable Credit	Schedule 3	Education Credits (post-graduate)		
Non-Refundable Credit	Schedule 3	Child Tax Credit and Dependent Credit		
Non-Refundable Credit	Schedule 3	Foreign Tax Credit		
Refundable Credit	Schedule 5	Net Premium Tax Credit	See 1095-A Form	
Refundable Credit	Schedule 5	Earned Income Credit	Min/Max income applies	
Refundable Credit	Schedule 5	Education Credits (first 4 years)		
General Deduction	1040 Page 2	Qualified Business Income Deduction	Simple for up to \$157k S and \$315k M	