

<b>TAX TIPSHEET</b> DC AARP TAX-AIDE	<b>STAP DC Input Checklist</b>		
	Tax Yr 2019	By: Kline Wilkins	02/10/20 v2

Taxpayer's Name: \_\_\_\_\_

Date: \_\_\_\_\_

<b>Circle One</b>	<b>During the tax year:</b>		
	What was the taxpayer's (TP's) date of last residence in the District of Columbia, and the new residence state?		____/____/____
Y / N	Did the TP and everyone on the federal return have health insurance during the DC residence period?	If no, which months did the TP and each person on the return <b>not</b> have insurance, and what were the reasons (not affordable, incarcerated, etc.)	
Y / N	Did TP receive <b>Survivor Benefits</b> from a Federal (including Military) or DC Government pension (1099-R Box7=4)?	If so, who was the payer and what was the benefit and the taxable portion?	
Y / N	Did TP receive 1099-R for <b>Disability Income</b> from the Federal or DC Government (1099-R Box7=3)?	If yes, who was the payer and what was the total benefit and the taxable portion?	
		If yes, has the TP been determined by the Social Security Administration to be totally and permanently disabled?	
		Was the TP's AGI above \$100,000?	Y / N
Y / N	Did TP receive <b>RRB</b> retirement income?	If so, what was the taxable amount reported on the federal return?	\$ _____
Y / N	Did TP contribute to a <b>DC College Savings Plan</b> ?	If yes, how much?	\$ _____
Y / N	Was TP a <b>teacher</b> in the DC Public or Public Charter Schools?	If yes, for how many weeks?	
		If yes, how much of his/her own money did the teacher spend on supplies and how much of the credit was taken on the federal return?	Total Spent     \$ _____ Federal Credit     \$ _____
Y / N	Did the TP own and live in a home in DC for all 12 months of the tax year?	If so, what was the address? (Be sure to specify the quadrant – NW, SW, NE, SE)	_____ _____

Y / N	Did the TP rent an apartment / home in DC <i>for all twelve months</i> of the tax year (even if a more than one address)?	If yes and the TP lived at the same address the entire time, what was the total rent paid, and the name, address, and phone number of the landlord?	Total Rent      \$ _____  Landlord name, address, and phone no.: _____ _____ _____ (_____) _____ - _____
		If yes and the TP moved during the year, what was the rent paid for December, and the name, address, and phone number of the landlord?	December Rent    \$ _____ _____ _____ _____ (_____) _____ - _____
Y / N	Did TP make any federal or DC <b><i>Estimated Tax Payments?</i></b>	Provide the amount(s) and date(s) of each payment.	____/____    \$ _____ ____/____    \$ _____ ____/____    \$ _____ ____/____    \$ _____ ____/____    \$ _____
Y / N	Did TP pay for <b><i>Long Term Care Insurance</i></b> in 2019?	If yes, what was the premium?	<i>KW: Is this just a federal return issue?</i>
Y / N	Did the TP itemize deductions on the federal return?	If yes, what were the total federal deductions?	

NOTE: The type of deductions used on the DC and federal returns match, i.e., standard on both or itemized on both.

Other comments: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

Requester: \_\_\_\_\_ Phone: \_\_\_\_\_ State: \_\_\_\_\_