



INCOME TAX CHECKLIST
TAX YEAR:

Personal

- Last Years Tax Return
- Names, Birthdates, SS#'s of Household Members
- Drivers License and SS Cards

Income

- Wages, W-2, 1099R
- Interest Income, 1099INT
- Social Security, SSA-1099
- Pension, 1099R
- Business Income/Loss
- Stock & Mutual Fund Sales, 1099B
- Year-end Investment Statements
- Sale of Home, HUD1
- Unemployment, 1099G
- Gambling/Lottery Winnings, 1099G
- Miscellaneous Income, 1099MISC
- IRA or 401K Distribution, 1099R
- Rental Income
- Partnership, S Corp & Trust Income

Credits

- Education Credits, 1098T
- Retirement Savings Contributions
- Childcare Credits – Need EIN or SS# of Provider
along with Address

Deductions

- Alimony Paid – Need SS# of Ex-Spouse
- Student Loan Interest, 1098E
- Moving Expenses
- Penalty on Early Withdrawal from Savings
- IRA Contributions
- Tuition & Fees Paid, 1098T

Itemized Deductions

- State Tax Refund
- Medical, Dental, Eyecare
- Investment Expenses
- Long Term Care Premium
- Real Estate Taxes Paid
- State & Local Taxes Paid
- Mortgage Interest, 1098
- Investment Interest Paid
- Charitable Contributions
- Employee Business Expenses
- Auto Expenses
- Gambling/Lottery Losses

Other

- Changes in Personal Information

Self Employed, Business Owners & Rental Property Owners

Call 305-387-5880 to review your individual situation