

Income Tax Checklist

Taxpayer's name			Spouse's name			
SSN			SSN			
Birthdate			Birthdate			
Occupation			Occupation			
Blind			Blind			
Address						
Phone			Phone			
		Depend				
Name		SSN	DOB	Relationship		
1)						
2)						
3)						
4)						
5)						
Dependent's		_				
Income	Your Support	Others support	No. of months I	ived at home		
1)\$	\$	\$				
2)\$	\$	\$				
3)\$	\$	\$				
4)\$	\$	\$				
5)\$	\$	\$				
		Documents	to bring			
W-2s 1099-INTs			1099-DIVs Property Tax bill			
K-1s	Labeled T		Other 1099s	Last year tax re		
K 13	Lubeled I	ax ioiiiis	Other 10333	Last year tax re	tarri	
		Incon	ne			
Interes	t Income (except :	1099-INT)	Dividend Income (except 1099-DIV)			
Whose?	Payer	<u></u> \$	Whose?	Payer \$		
		Other Inc	come			
Sales of Stock or the		Other Inc		ng all figures and supportin	g	
Sales of Stock or the Property	Cost	Other Inc		ng all figures and supportin	g	
	Cost		Other income (please bri data): Tips	ng all figures and supportin	g	
	Cost		Other income (please bri data): Tips Pensions and annuity	<u> </u>	g	
	Cost		Other income (please bri data): Tips Pensions and annuity Unemployment (1099-G)	<u> </u>	g	
	Cost		Other income (please bri data): Tips Pensions and annuity Unemployment (1099-G Jury duty	<u> </u>	g	
	Cost		Other income (please bri data): Tips Pensions and annuity Unemployment (1099-G)	<u> </u>	g	
	Cost		Other income (please bri data): Tips Pensions and annuity Unemployment (1099-G) Jury duty Alimony (received) Prizes (1099-MISC) Self-employment		g	
	Cost		Other income (please bri data): Tips Pensions and annuity Unemployment (1099-G) Jury duty Alimony (received) Prizes (1099-MISC) Self-employment Partnerships and S corp i		g	
	Cost		Other income (please bridata): Tips Pensions and annuity Unemployment (1099-G) Jury duty Alimony (received) Prizes (1099-MISC) Self-employment Partnerships and S corp in Estates and trusts		g	
	Cost		Other income (please bridata): Tips Pensions and annuity Unemployment (1099-G) Jury duty Alimony (received) Prizes (1099-MISC) Self-employment Partnerships and S corp i Estates and trusts Social security benefits	ncome	g	
		Sales Price	Other income (please bridata): Tips Pensions and annuity Unemployment (1099-G) Jury duty Alimony (received) Prizes (1099-MISC) Self-employment Partnerships and S corp in Estates and trusts Social security benefits Scholarships and fellows	ncome	g	
Property	or rental property, p	Sales Price	Other income (please bridata): Tips Pensions and annuity Unemployment (1099-G) Jury duty Alimony (received) Prizes (1099-MISC) Self-employment Partnerships and S corp in Estates and trusts Social security benefits Scholarships and fellows Tax refunds Royalties	ncome	g	
• If you own business	or rental property, p	Sales Price	Other income (please bridata): Tips Pensions and annuity Unemployment (1099-G) Jury duty Alimony (received) Prizes (1099-MISC) Self-employment Partnerships and S corp i Estates and trusts Social security benefits Scholarships and fellows Tax refunds Royalties Gambling winnings	ncome	g	
• If you own business	or rental property, p	Sales Price	Other income (please bridata): Tips Pensions and annuity Unemployment (1099-G) Jury duty Alimony (received) Prizes (1099-MISC) Self-employment Partnerships and S corp in Estates and trusts Social security benefits Scholarships and fellows Tax refunds Royalties	ncome	g	

please provide us with form 1099-A or/and 1099-C.



Deductions and Credits

		Deddetions at	ia cicaits			
	Retirement		Chariti	es/Donations		
Traditional IRA Contribu	tion	Date	Church			
\$	Taxpayer		Other Cash contributions			
\$	Spouse		Charitable auto mileage			
Roth IRA Contribution		Date	Property donated (receipts	confirmation)		
\$	Taxpayer		Other			
\$	Spouse					
Penalty for early withdra	awal	\$	Casualty	and Theft Loss		
Alimony (paid)		\$	Cost of property lost			
Self-employed health in:	surance	\$	FMV of property			
SEP, Keogh & Simple Co	ntributions	\$	Insurance reinbursement re	ceived		
Medical Expenses			Job related moving expenses			
Health Savings Account	(HSA) contributions		Travel and lodging			
Insurance & Medical Pre	emiums		Moving household gods			
Perscriptions			-			
Eyeglasses			Business	auto expenses		
Doctor's visits		-	Parking & tolls			
Dentists			Business mileage			
Hospital			Gas & oil			
Ambulance			Interest			
Medical auto milage			Other			
Other medical travel exp	penses		_			
Reimbursements						
			•			
	Taxes		Mis	cellaneous		
Real Estate Tax			Dues & subscriptions			
Personal property tax			Donations			
City/county tax			Equipment			
Sales tax			Uniforms			
Other		-	Job seeking expenses		-	
Other			Tax preparation fees			
Taxes	State	Federal	Tools			
Date pd.			Business entertainment			
Date pd.			Investment & tax advice			
Date pd.			Safe-deposit box			
Date pd.			Hobby losses			
	Interest Expenses		Gambling losses			
Home Mortgage (1098)	mercor Expense.		Impaiement related work ex	vnenses		
Home Mortgage -pd. to	others	-	Classrom expenses for teach			
	of individuals)	-	Energy property installed			
(Name & 55N	or marviduals;	-	Other		_	
Investment Interest			-			
Student Loan Interest (1	.098-E)					
	·	Child Care Ex	VPOPCOC			
Duncido	ula manna		•	ID # of manidon(s)	A	
Provide	r's name	1	Address	ID # of provider(s)	Amount pd.	
				 	 	
					1	
		Education Credit	ts (10998-T)			
Name of Institution		Tuition pd.	Who attended	When classes began		
				1		