

J&A INCOME TAX 2016 CHECKLIST

51064 DW SEATON, NEW BALTIMORE, MI 48047 (586-725-1633)

INCOME

W2 and 1099 Forms
Dividends & Interest
Sales of Stock
Social Security
Unemployment Comp
Pension, IRA, Annuities
Self Employment
Rental and Royalty
Partnership and S-Corp
Estates and Trusts
Gambling Winnings
Alimony Received
Sales of Property
Sale of Residence
Child Support
Received*
Workmen's Comp*
FIA Cash Benefits*
***Not taxable, but may
be needed for state
credit.**

ADJUSTMENTS AND CREDITS

HSA Contributions
Moving Expenses
Alimony Paid
IRA Contributions
Student Loan Interest
Day Care Expenses
College Tuition, Books
Educator Expenses

LOSSES

Gambling*
Only to the extent of
winnings claimed as
income, losses include
losing lotto tickets,
printouts from the
casino.

ITEMIZED DEDUCTIONS

MEDICAL*

*** A portion may be
deductible if total
medical expenses for
2015 exceed 10.0% of
your adjusted gross
income.**

FORM 1095 A,B or C

Insurance Premiums
Dental and Doctor
Optical
Qualified Medical Home
Improvements
Medical Miles Driven
Long Term Care Ins.

**SEE ENCLOSED ACA
DOCUMENT**

TAXES

Primary Residence
Second home
Vacant Property
License Plate Fees
State Sales Tax*
***Deductible if sales tax
paid is higher than
state tax withheld from
W2, 1099 or Estimates.**

CHARITABLE

Cash and Check
Non Cash (clothing etc.)
Church Tithes
Volunteer Miles Driven
Please bring in proof for
any contribution over
\$250.

INTEREST

Mortgage, Equity Loan

Qualifying Boat or RV
Interest, Investment

MISC DEDUCTIONS

***Expenses in this
category are partially
deductible if the
amount claimed
exceeds 2% of adjusted
gross income. These
items include, but are
not limited to:**

Union Dues
Uniforms
Professional Dues
Tools and Equipment
Safety Gear
Tax Prep Fee
Business Mileage
(54 cents per mile)
Safe Deposit Box
Investment Expenses
Qualified Meals
Job Hunting Expenses

- **Deductible
when seeking a
new job within
the same line of
work. Expenses
include travel,
employment
agency fees,
resume, etc.**

**Energy Efficient Home
Improvements.**

O Windows

O Insulation

O Furnace

O Misc Improvements