

## Personal Tax Checklist

### Personal Information

	Full Name	Social Security #	Relationship	Date of Birth	Health Insurance
Self					
Spouse					
Dependent					
Dependent					
Dependent					
Dependent					
Dependent					
Address:					
Phone:					
Email:					

**Filing Status:** Married   Single   Widowed   Head of Household   Married Filing Separate

### Income Information

- ◆ Income from Employment
- ◆ W-2 Form for each employer for whom you and your spouse worked
- ◆ \_\_\_\_\_ ◆ \_\_\_\_\_
- ◆ \_\_\_\_\_ ◆ \_\_\_\_\_
- ◆ \_\_\_\_\_ ◆ \_\_\_\_\_

- ◆ W-2G Gambling Winnings                      Amount \$ \_\_\_\_\_
- ◆ 1099- Misc.- Subcontractor                      Amount \$ \_\_\_\_\_
- ◆ 1099-R-Retirement                              Amount \$ \_\_\_\_\_
- ◆ 1099-G-Unemployment                          Amount \$ \_\_\_\_\_
- ◆ 1099-INT-Interest                                 Amount \$ \_\_\_\_\_
- ◆ 1099-DIV-Dividends                             Amount \$ \_\_\_\_\_
- ◆ 1099-SSA-Social Security                        Amount \$ \_\_\_\_\_
- ◆ Stock Sales                                         Amount \$ \_\_\_\_\_
- ◆ State Refund                                        Amount \$ \_\_\_\_\_
- ◆ Alimony    Amount \$ \_\_\_\_\_
- ◆ Military Income/Pension                         Amount \$ \_\_\_\_\_

### Childcare Costs

- ◆ W-10    Amount \$ \_\_\_\_\_

### Tuition and Fees

- ◆ 1098-T     Amount \$ \_\_\_\_\_

### Educator Expenses

Amount \$ \_\_\_\_\_

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### HSA

- ◆ Contributions Amount \$ \_\_\_\_\_
- ◆ Distributions Amount \$ \_\_\_\_\_

### IRA

- ◆ Traditional Contribution Amount \$ \_\_\_\_\_
- ◆ Roth Contributions Amount \$ \_\_\_\_\_

### Student Loan Interest

- ◆ 1098-E Amount \$ \_\_\_\_\_

### Itemized Deductions

- ◆ Medical and Dental Expenses Amount \$ \_\_\_\_\_ (out of pocket)
- ◆ Medical Miles Amount \_\_\_\_\_
- ◆ Real Estate Taxes 1098 Amount \$ \_\_\_\_\_
- ◆ Vehicle License Fees Amount \$ \_\_\_\_\_
- ◆ Home Mortgage Interest 1098 Amount \$ \_\_\_\_\_
- ◆ Mortgage Insurance 1098 Amount \$ \_\_\_\_\_
- ◆ Gifts to Charity by cash Amount \$ \_\_\_\_\_
- ◆ Donations to Charity Amount \$ \_\_\_\_\_
- ◆ Charitable Miles Amount \_\_\_\_\_
- ◆ Unreimbursed Job Expense Amount \$ \_\_\_\_\_
- ◆ Safe Deposit Box Fee Amount \$ \_\_\_\_\_

### Moving Expenses

Amount \$ \_\_\_\_\_

### Kids School Expenses

- ◆ Required School Expense Amount \$ \_\_\_\_\_
- ◆ Dance Amount \$ \_\_\_\_\_
- ◆ Musical Instrument Amount \$ \_\_\_\_\_
- ◆ Drivers Ed Amount \$ \_\_\_\_\_

◆ **Note see link on [Diamondtax.net](http://Diamondtax.net) for detailed expenses.**

### Military Expense

- ◆ Reservist Train more than 100 Miles
- ◆ Away from home, per diem, mileage,
- ◆ Parking, tolls, hotel/car. Amount \$ \_\_\_\_\_ Deduction for 1040
- ◆ MN National Guard/Reserve Pay Amount \$ \_\_\_\_\_ Deduction for MN
- ◆ Military Pension Amount \$ \_\_\_\_\_ Deduction for MN

### Property Tax Refund

- ◆ CRP- Rent Credit
- ◆ Property Tax Statement – The one that comes out in early April