

INCOME TAX CHECKLIST

Taxpayer's name	SSN	
Spouse's name	SSN	
Taxpayer's occupation	Birthdate	Blind?
Spouse's occupation	Birthdate	Blind?
Address		
Phone		

DEPENDENTS

Name	SSN	Birthdate	Relationship
1)			
2)			
3)			
4)			

Income	Support by you	Support by others	Months in your home
1) \$	\$	\$	
2) \$	\$	\$	
3) \$	\$	\$	
4) \$	\$	\$	

NOTE: You must provide a social security number for all dependents.

PAPERWORK TO BRING

<input type="checkbox"/> W-2s	<input type="checkbox"/> 1099-INTs	<input type="checkbox"/> 1099-DIVs	<input type="checkbox"/> Other 1099s
<input type="checkbox"/> K-1s	<input type="checkbox"/> Tax forms with labels	<input type="checkbox"/> Property tax bill	<input type="checkbox"/> Last year's tax return

INCOME

INTEREST INCOME (if not on 1099-INT)			DIVIDEND INCOME (if not on 1099-DIV)		
T/S/J	Payer	\$	T/S/J	Payer	\$

****Health insurance coverage information is required. Bring any 1095 A, B, or C form(s) received.**

OTHER INCOME

SALE OF STOCK OR OTHER PROPERTY	Cost	Sales Price	
			If you have other income, please bring all figures and supporting data. Examples: Tips _____ Pensions / annuities _____ Jury duty _____ Unemployment (1099-G) _____ Alimony received _____ Prizes (1099-MISC) _____ Self-employment _____ Partnerships and S corporations _____ Estates & trusts _____ Social security benefits _____ Scholarships & fellowships _____ Tax refunds _____ Royalties _____ Nontaxable income _____ Gambling _____ Other _____

Please bring supporting documents (Form 1099-Bs and statements)

- If you have a business or rental property, please attach an income/loss statement and supporting documents.
- If you borrow money and the debt is canceled or forgiven, please include Form 1099-A and/or 1099-C.

DEDUCTIONS AND CREDIT ITEMS

RETIREMENT

Payments to a Traditional IRA
 Taxpayer Date _____
 Spouse Date _____
 Payments to a Roth IRA
 Taxpayer Date _____
 Spouse Date _____
 Penalty for early withdrawal _____
 Alimony paid _____
 Self-employed health insurance _____
 Keogh, SEP & Simple contributions _____

MEDICAL EXPENSES

Medical Savings Account (MSA) contributions _____
 Health Savings Account (HSA) contributions _____
 Insurance & Medicare premiums _____
 Prescriptions _____
 Eyeglasses _____
 Doctors _____
 Dentists _____
 Hospital _____
 Ambulance _____
 Medical auto mileage _____
 Other medical travel expenses _____
 Hearing aids & batteries _____
 Other medical expenses _____
 Reimbursements _____

TAXES

Real estate tax _____
 Personal property tax _____
 City / county tax _____
 Sales tax _____
 Other _____

Estimated Taxes	State	Federal
Date pd.		
Date pd.		
Date pd.		
Date pd.		

INTEREST EXPENSE

Home mortgage (1098) _____
 Home mortgage – pd. to individuals _____
 (Include name and SSN of individuals) _____
 Investment interest _____
 Interest pd. on student loans (1098-E) _____

CONTRIBUTIONS

Church _____
 Other cash contributions _____
 Charitable auto mileage _____
 Property donated for which you have receipts (fair market value) _____
 Other _____

CASUALTY & THEFT LOSSES

Cost of property lost _____
 Fair market value of property _____
 Insurance reimbursement received _____

JOB-RELATED MOVING EXPENSES

Travel & lodging _____
 Moving household goods _____

BUSINESS AUTO EXPENSES

Total miles _____
 Business miles _____
 Gas & oil _____
 Interest _____
 Tolls & local transportation _____
 Other _____

MISCELLANEOUS

Dues & subscriptions _____
 Education _____
 Safety equipment _____
 Uniforms _____
 Job seeking expenses _____
 Tax preparation _____
 Tools _____
 Business entertainment _____
 Investment & tax advice _____
 Safe-deposit box _____
 Hobby losses _____
 Gambling losses _____
 Impairment related work expenses _____
 Classroom expenses for teachers _____
 Energy property installed _____
 Other _____

CHILD CARE EXPENSES – Bring list of monthly totals

Provider's name	Address	ID# of provider(s)	Amount pd.

EDUCATION CREDITS (1098-T)

Name of institution	Tuition pd.	Who attended	When classes began

LOANS: If you borrowed money during the year, bring a list showing the amounts, dates and use of proceeds.