INCOME TAX CHECKLIST

YOUR TAX RETURN CAN BE DONE MORE ACCURATELY AND IN A SHORTER PERIOD OF TIME BY PROVIDING ALL OF THE APPLICABLE INFORMATION.

PERSONAL INFORMATION

- ☐ Social Security Card(s)
- ☐ Driver's License(s)
- ☐ Dependents' Social Security Numbers and Dates of Birth
- ☐ Copy of Last Year's Federal & State Returns (New Clients Only)

INCOME FORMS

- ☐ W-2 Wages
- ☐ 1099-R Pension or Retirement
- ☐ 1099-INT or Form 1099-DIV Interest & Dividends
- ☐ 1099-G State Income Tax Refund or Unemployment
- ☐ SSA-1099 Social Security Income
- ☐ 1099-B Sale of Stock or Bonds
- ☐ W-2G Gambling/Lottery Winnings
- ☐ 1099-C Cancellation of Debt
- ☐ Alimony Paid/Received
- ☐ 1099-MISC Self-Employment Income from Business or Farms and Expenses
- ☐ 1099-SA Distributions from HSA
- ☐ Commissions Received
- ☐ Rental Income & Expenses
- ☐ Schedule K-1 Partnership/S Corporation/Trust/Estates
- ☐ Other Income

PERSONAL EXPENSES/DEDUCTIONS

- ☐ 1095-A, B or C Healthcare Information
- ☐ Childcare Exp/Provider Address & ID #
- ☐ Medical/Eye/Dental Expenses
- ☐ Charitable Contributions Cash & Non-Cash
- ☐ Information regarding Sale/Purchase of Home
- ☐ 1098 Mortgage Interest Statement
- ☐ Real Estate/Personal Property Taxes Paid
- ☐ State & Local Sales Tax Paid
- ☐ Payments from Qualified Education Programs (1099-Q)
- ☐ Education Expenses (Work Related or 1098-T)
- ☐ 1098-E Student Loan Interest
- ☐ IRA/HSA Contributions
- ☐ Gambling Losses to the Extent of Winnings
- ☐ Estimated Tax Payments
- ☐ Foreign Taxes Paid

THE OLD TAX HOUSE