



Name: _____

Tax Form Checklist

(Optional - for reference)

Checklist of information needed to complete your tax return

If you have any of the items listed below, check the box and attach the information (not all items will apply to you)

INCOME INFORMATION:

- | | |
|---|---|
| <input type="checkbox"/> Wages (Form W-2) | <input type="checkbox"/> IRA/Pension/Annuity Distributions (Form 1099-R) |
| <input type="checkbox"/> Interest income (Form 1099-INT) | <input type="checkbox"/> State and Local Refunds (Form 1099-G) |
| <input type="checkbox"/> Composite 1099 from Broker | <input type="checkbox"/> Gambling Income (Form W-2G) |
| <input type="checkbox"/> Dividend income (Form 1099-DIV) | <input type="checkbox"/> Schedule K-1 from Partnerships, S Corps, Trusts |
| <input type="checkbox"/> Stock Sale Information/Capital Gains (Form 1099-B) | <input type="checkbox"/> Foreign bank accounts, Foreign income and Foreign taxes paid |

Other Income items:

- | | |
|---|---|
| <input type="checkbox"/> Alimony Received | <input type="checkbox"/> Tip Income |
| <input type="checkbox"/> Unemployment Compensation (Form 1099-G) | <input type="checkbox"/> Payments from qualified education programs (Form 1099-Q) |
| <input type="checkbox"/> Social Security Benefits (Form 1099-SSA) | <input type="checkbox"/> Bartering Income (Form 1099-B) |
| <input type="checkbox"/> Disability Income | <input type="checkbox"/> Jury Duty Pay |
| <input type="checkbox"/> Forgiveness of Debt income (Form 1099-C or 1099-A) | |

Sale of Real Estate:

- Closing Statement - Sale of Property
- Closing Statement - Purchase of Property
- List of additional improvements while you owned the property
- Small Business (Use Sch C Small Business PDF on our website)
- Rental Property (Use Sch E Rental PDF on our website)
- Business use of auto (use Business Auto Expense PDF on our website)

DEDUCTION INFORMATION:

- | | |
|---|--|
| <input type="checkbox"/> IRA Contributions (Form 5498) | <input type="checkbox"/> Mortgage interest (Form 1098) |
| <input type="checkbox"/> SEP, Simple, Keogh Plan Contributions (Form 5498) | <input type="checkbox"/> Real Estate Taxes |
| <input type="checkbox"/> Alimony Paid | <input type="checkbox"/> Casualty/Theft Loss |
| <input type="checkbox"/> Please provide recipient name and SS# <i>securely</i> | <input type="checkbox"/> Moving Expenses for job related moves over 50 miles |
| <input type="checkbox"/> Student loan interest (Form 1098-E) | <input type="checkbox"/> Other Taxes (including sales tax paid on the purchase of autos, boats and RVs for personal use) |
| <input type="checkbox"/> Investment Interest Expense | |
| <input type="checkbox"/> Medical Expenses (Use Medical Expenses PDF found on our website) | |
| <input type="checkbox"/> Health care coverage (Form 1095-B / 1095-C) | <input type="checkbox"/> HSA contributions (Form 5498-SA) |
| <input type="checkbox"/> Health care Market Place Statement (Form 1095-A) | <input type="checkbox"/> HSA distributions (Form 1099-SA) |
| <input type="checkbox"/> Monetary and Non-Monetary Charitable Contributions (Use Charitable Contributions PDF on our website) | |

Tax Credit and Tax Payment Information:

- | | |
|---|---|
| <input type="checkbox"/> Child Care Expenses (provide year-end statement with provider's name, address and EIN) | <input type="checkbox"/> Tuition Statements (Form 1098-T) & Education Expenses |
| <input type="checkbox"/> Estimated tax payments (Use Estimated Tax Payments PDF on our website) | <input type="checkbox"/> Solar panels or fuel-cell/ hybrid vehicle tax credit information |
| <input type="checkbox"/> Form 8832 - Release of exemption for dependent children to non-custodial parent | <input type="checkbox"/> If new bank account, copy of voided check |