

# Income Tax Checklist

Taxpayer's name \_\_\_\_\_ SSN \_\_\_\_\_  
 Spouse's name \_\_\_\_\_ SSN \_\_\_\_\_  
 Taxpayer's occupation \_\_\_\_\_ Birthdate \_\_\_\_\_ Blind? \_\_\_\_\_  
 Spouse's occupation \_\_\_\_\_ Birthdate \_\_\_\_\_ Blind? \_\_\_\_\_  
 Address \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Did you receive, sell, send, exchange or disposed of any financial interest in virtual currency? Y or N \_\_\_\_\_

## DEPENDENTS

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

  

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

\* You must provide a Social Security number for all dependents.

## PAPERWORK TO BRING

W-2s     1099-INT/DIV     1099-NECs     ACTC Letter 6419  
 K-1s     Property tax bill     Last year's tax return     Health insurance coverage information

## ECONOMIC IMPACT PAYMENTS

	Taxpayer & Spouse	Dependents
Amount received for third payment	\$ _____	\$ _____

## 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 \_\_\_\_\_
- Hobby income \_\_\_\_\_
- 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.

\* Not taxable for divorces commencing after Dec. 31, 2018

# Deductions and Credit Items

## RETIREMENT

Contributions to a traditional IRA  
 Taxpayer Date \_\_\_\_\_  
 Spouse Date \_\_\_\_\_

Contributions to a Roth IRA  
 Taxpayer Date \_\_\_\_\_  
 Spouse Date \_\_\_\_\_

Penalty for early withdrawal \_\_\_\_\_

Alimony pd. (can't deduct for divorces commencing after 12/31/18) \_\_\_\_\_

Keogh, SEP & SIMPLE contributions \_\_\_\_\_

## INTEREST EXPENSE

Home mortgage (1098) \_\_\_\_\_

Home mortgage – pd. to individuals \_\_\_\_\_  
 (Include name and SSN of individuals)

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Mortgage insurance premiums \_\_\_\_\_

Investment interest\*\* \_\_\_\_\_

Student loan interest (1098-E) \_\_\_\_\_

## 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 \_\_\_\_\_

Self-employed health insurance \_\_\_\_\_

## CONTRIBUTIONS

Church \_\_\_\_\_

Other cash contributions \_\_\_\_\_

Charitable auto mileage \_\_\_\_\_

Property donated for which you have receipts (fair market value) \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

For 2021, taxpayers using the standard deduction are allowed an above-the-line charitable contribution of up to \$300 for single and \$600 for married.

## TAXES

Real estate tax \_\_\_\_\_

Personal property tax\* \_\_\_\_\_

City/county tax\* \_\_\_\_\_

Sales tax \_\_\_\_\_

Other\* \_\_\_\_\_

## CASUALTY & THEFT LOSSES

The following expenses may only be claimed in a federally declared disaster area.

Cost of property lost \_\_\_\_\_

Fair market value of property \_\_\_\_\_

Insurance reimbursement received \_\_\_\_\_

## OTHER ADJUSTMENTS

Moving expenses - Armed Forces members only \_\_\_\_\_

Gambling losses \_\_\_\_\_

Educator expenses \_\_\_\_\_

Estimated taxes	State	Federal
Date pd.		
Date pd.		
Date pd.		
Date pd.		

## 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.

\* Taxpayers who itemize can deduct their state individual income, sales and property taxes up to a limit of \$10,000 in total.

\*\* For taxpayers who itemize, your investment interest expense deduction is limited to your net investment income.