



TAX PREP CHECKLIST

Income Checklist

Check all that apply

- | | |
|--|---|
| <input type="checkbox"/> W2's | <input type="checkbox"/> 1099 MISC |
| <input type="checkbox"/> 1099SA | <input type="checkbox"/> 1099 NEC |
| <input type="checkbox"/> 1098 Student Loan Interest Paid | <input type="checkbox"/> 1098T Tuition and Fees Paid |
| <input type="checkbox"/> Health Savings account | <input type="checkbox"/> (CPR) Certificate of Rent Paid |
| <input type="checkbox"/> Cost of Securities Sold | <input type="checkbox"/> Alimony Paid |
| <input type="checkbox"/> IRA Contributions | <input type="checkbox"/> 1099 Interest |
| <input type="checkbox"/> 1099 G | <input type="checkbox"/> 1099 DIV |
| <input type="checkbox"/> 1099R | <input type="checkbox"/> K1 from 1065/1120/1120S |

Deduction Expenses

- | | |
|--|---|
| <input type="checkbox"/> 1098 Mortgage Interest Paid | <input type="checkbox"/> Real Estate Taxes Paid |
| <input type="checkbox"/> State Estimated Taxes Paid | <input type="checkbox"/> Federal Estimated Taxes Paid |
| <input type="checkbox"/> Charitable Contributions | <input type="checkbox"/> Unreimbursed Employee expenses |
| <input type="checkbox"/> Medical/Moving Mileage | <input type="checkbox"/> Work Related Moving Expense |
| <input type="checkbox"/> Investment Expenses | <input type="checkbox"/> Gambling losses(limit to winnings) |
| <input type="checkbox"/> Out of Pocket Medical Expenses | <input type="checkbox"/> Personal Property Taxes(car tabs) |
| <input type="checkbox"/> Sold/Refinance Home | <input type="checkbox"/> If sold cost of repairs to home |
| <input type="checkbox"/> Tax Prep Fee | <input type="checkbox"/> Daycare Expenses |
| <input type="checkbox"/> Educator Expenses (out of Pocket) | |
| <input type="checkbox"/> Energy Efficient Expenses | <input type="checkbox"/> Job Seeking Expenses |