



SPECIALIZED ACCOUNTING SERVICES

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Personal Income Tax Return Checklist

Taxable Income Forms and Documents

- W-2 forms for Wages, Salaries, and Tips
- Interest Income Statements: Form 1099-INT and 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
- Sales of Real Estate: Form 1099-S
- State Tax Refunds: Form 1099-G
- Alimony Paid or Received
- Unemployment Compensation Received: Form 1099-G
- Nonemployment Compensation: Form 1099-NEC
- Miscellaneous Income: Form 1099-MISC
- Retirement Income: Form 1099-R
- Social Security Income and Railroad Retirement Income: Form SSA-1099
- Business Income and Expenses
- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Tax Deductible Miles Traveled for Business Purposes
- Tax Credits
- Child Tax Credit - Dependent Name, SSN, and Other Information
- Child Care Provider Address, I.D. Number and Amounts Paid for the Child and Dependent Care Credit
- Earned Income Tax Credit (EITC) - Income Information
- Adoption Expense Information for the Adoption Tax Credit
- Foreign Taxes Paid
- First Time Home Buyer Tax Credit

Tax Estimate Payments

- Estimated Tax Payments Made with ES Vouchers Online
- Last Year's Tax Return Over Payment Applied to this Year
- Off Highway Fuel Taxes Paid

Tax Deduction and Expenses

- Medical Expenses for the Family
- Medical, Health Insurance Paid: Form 1095-A
- Self-Employed Business Expenses
- Prescription Medicines and Drugs
- Doctor and Dentist Payments
- Hospital and Nurse Payments
- Tax Deductible Miles Driven for Medical Purposes
- Home Mortgage Interest: Form 1098
- Second Home Mortgage Interest Paid
- Real Estate Taxes Paid
- State Taxes Paid with Last Year's Return (if itemizing)
- Personal Property Tax Paid
- Charitable Cash Contributions Made
- Fair Market Value of Non-cash Contributions to Charities
- Unreimbursed Expenses Related to Volunteer Work
- Tax Deductible Mileage for Volunteer Purposes
- Casualty and Theft Losses
- Amount Paid to Professional Preparer from Last Year
- Investment Expenses
- IRA Contributions
- HSA, FSA Contributions
- Student Loan Interest Paid: Form 1098-E
- Moving Expenses

General Information

- Copy of Last Year's Tax Return
- Social Security Numbers for You and Your Spouse
- Educational Expenses for You and Your Spouse
- Dependent's Names, Years of Birth, and Social Security Numbers
- Dependent's Post High School Educational Expenses
- Child Care Expenses for Each Dependent
- Prior Year Adjusted Gross Income
- Routing Transit Number and Bank Account Number for Direct Deposit