



PERSONAL INCOME TAX CHECKLIST

TAX YEAR: _____

Personal:

- Last Year's Tax Return
- Names, Birthdates, SS#'s of Household Members
- Driver's License and SS Cards

Income:

- Wages, W-2, 1099R
- Interest Income, 1099INT
- Social Security, SSA-1099
- Pension, 1099R
- Business Income/Loss
- Stock & Mutual Fund Sales, 1099B
- Year-end Investment Statements
- Sale of Home, HUD1
- Unemployment, 1099G
- Gambling/Lottery Winnings, 1099G
- Miscellaneous Income, 1099 MISC
- IRA or 401K Distribution, 1099R
- Rental Income
- Partnership, S Corp & Trust Income (K-1)

Credits:

- Education Credits, 1098T
- Retirement Savings Contributions
- Childcare Credits – Need EIN or SS # of Provider along with Address

Deductions:

- Alimony Paid – Need SS# of Ex-Spouse
- Student Loan Interest, 1098E
- Moving Expenses
- Penalty on Early Withdrawal from 401K or any other retirement savings
- IRA Contributions
- Tuition & Fees Paid, 1098T

Itemized Deductions:

- State Tax Refund
- Medical, Dental, Eyecare
- Investment Expenses
- Long Term Care Premium
- Real Estate Taxes Paid
- State & Local Taxes Paid
- Mortgage Interest, 1098
- Investment Interest Paid
- Charitable Contributions
- Employee Business Expenses
- Auto Expenses
- Gambling/Lottery Losses

Other:

- Changes in Personal Information

Self Employed, Business Owners & Rental Property Owners

Call (305) 387-5880 to review your individual situation