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Personal Income Tax Information Checklist

INCOME:

W2	Wages from Job	1099MISC	Miscellaneous Income, Rent Income Nonemployee Compensation
1099-R	Retirement/Pensions		Farm Income
SSA-1099	Social Security		Rental Income
1099INT	Interest Income		Unemployment Compensation
1099DIV	Dividend Income		Business Income - Schedule C, Corporate Income, Partnership
1099B	Sale of Stock/Securities		<i>Examples: Mary Kay, Beauticontrol, Premier Jewelry, Other Side Businesses</i>
1099C	Cancellation of Debt	Other	Gambling Winnings, Prizes & Awards, Jury Duty, Alimony Received, and Other Miscellaneous Income
1099G	Government Payments		

DEDUCTIONS TO INCOME:

Educator Expenses	HSA Contributions	Moving Expenses
Alimony Paid	IRA Contributions	Student Loan Interest

ITEMIZED DEDUCTIONS:

Medical (Must be > 10% of AGI)

Health Insurance Premiums	Long Term Care Payments	Dental Expenses
Eye Care Expenses	Prescriptions	Medical Miles

Taxes Paid

Prior Year State Income Taxes	Real Estate Taxes	Personal Property Taxes
City / Local Taxes Paid	Sales Tax (on large purchases or if no state income tax)	

Interest Paid

Mortgage Interest Paid (1098INT)	Investment Interest
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Charitable Contributions

Cash / Check Gifts	Noncash Contributions	Charitable Miles
<i>Examples: Church Donations, United Way, St. Jude, etc.</i>	<i>Examples: Goodwill Donations, Safehouse for Women, Salvation Army, etc.</i>	Volunteer Expenses Volunteer Miles

★ Please remember that you need to obtain a receipt for **ALL** noncash contributions. It needs to include the organization and their federal identification number, date, and value. It is also recommended to attach a list of the items donated. A valuation guide for items is available to print on the website.

★ It is required to have a receipt from the organization for cash donations above \$250, but we will also need documentation or written verification for other cash/check contributions as well.

CREDITS:

Education Credits - Obtain a 1098T from the higher education institution.

Child & Dependent Care - We must have the name, address, social security number/EIN of provider, and amount paid.

MISCELLANEOUS ITEMS:

1095A, 1095B, 1095C Used to verify health insurance. If you have coverage, we **NEED** to have at least one of the forms listed to file your tax return. Obtain it through the marketplace, insurance company, or employer.

Estimated Taxes Paid - If you made any estimated tax payments, please list the amounts and dates they were paid.

Rental Property Summary - See website for printable page or the office for a copy.

Schedule C (Business) Deduction List - See website for printable page or the office for a copy.