

## Checklist for Federal Income Tax Return

### Income:

1. W-2's from Employers
2. 1099's for Self Employed
3. Interest Income (1099-Int)
4. Dividend Income (1099-Div)
5. K-1's & Royalties
6. Business Income / Expenses
7. Farm Income / Expenses
8. Retirement Distributions (1099-R)
9. Stock Sales (1099-B)
10. Sale of Investments
11. Rental Income / Expenses
12. Unemployment Compensation Benefits
13. Social Security Benefits (SSA-7005)
14. HSA Distributions (1099-SA)
15. Foreign Income Account Information

### Deductions:

1. Traditional IRA Contribution
2. Roth IRA Contribution
3. Premium Credit (insurance purchased on HealthCare.gov.. form 1099-A)
4. Student Loan Interest Paid
5. Medical Expenses Paid
6. Mortgage Interest Paid (1098)
7. Property Taxes Paid
8. Sales Tax on Automobile Purchase
9. Educator's Expenses (Teachers)
10. Moving Expenses (Military Only)
11. Contributions (Cash & Non-Cash)
12. College Tuition paid (taxpayer or dependents)
13. Childcare expenses (under 14 years old)
14. Prepaid Federal Tax Deposits

### General Information:

Dependents – Names, SS #, DOB, Relationship

