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Checklist for Federal Income Tax Return

Income:	Form
<input type="checkbox"/> Wages from Employers	W-2
<input type="checkbox"/> Self Employed / Contractor	1099-NEC / 1099-MISC
<input type="checkbox"/> Interest Income	1099-INT
<input type="checkbox"/> Dividend Income	1099-DIV
<input type="checkbox"/> Stock Sales	1099-B
<input type="checkbox"/> Partnership and Royalty Income	Schedule K-1
<input type="checkbox"/> Retirement Distributions	1099-R
<input type="checkbox"/> Unemployment Compensation Benefits	1099-G
<input type="checkbox"/> Social Security Benefits	SSA-1099
<input type="checkbox"/> HSA Distributions	1099-SA
<input type="checkbox"/> Gambling Winnings	W-2G
<input type="checkbox"/> Business Income / Expenses	
<input type="checkbox"/> Farm Income / Expenses	
<input type="checkbox"/> Rental Income / Expenses	
<input type="checkbox"/> Sale of Investments	
<input type="checkbox"/> Foreign Income Account Information (\$10,000 or more)	

Deductions:	Form
Retirement	
<input type="checkbox"/> Traditional IRA Contribution	5498
<input type="checkbox"/> Roth IRA Contribution	5498
Education	
<input type="checkbox"/> Student Loan Interest Paid	1098-E
<input type="checkbox"/> Educator's Expenses (Teachers)	
<input type="checkbox"/> College Tuition paid	1098-T
Itemized Deductions (Must total over Standard)	
<input type="checkbox"/> Medical Expenses Paid	
<input type="checkbox"/> Mortgage Interest Paid	1098
<input type="checkbox"/> Property Taxes Paid	1098
<input type="checkbox"/> Sales Tax Paid on Major Purchases	
<input type="checkbox"/> Contributions and Donations	

Other Items	
<input type="checkbox"/> Childcare expenses (under 14 years old)	
<input type="checkbox"/> Prepaid Federal Tax Deposits (Estimated Payments)	
<input type="checkbox"/> Premium Tax Credit – Affordable Healthcare Act	Form 1095-A
<input type="checkbox"/> Qualified Car Loan Interest	
<input type="checkbox"/> Residential Energy Upgrades (Doors/Windows/AC/Insulation)	
<i>*Not appliances, and only for items in primary residence</i>	

***New Client General Information:

- ☐ Taxpayer (and Spouse) Name, SS# and Date of Birth
- ☐ Dependents – Names, SS#, Date of Birth, Relationship
- ☐ Current Address