

Reminder Checklist for Tax Preparation

Income

- W-2 Wages
- Interest & Dividends
- Social Security Benefits
- Unemployment Compensation
- Pension & IRA distributions 1099-R

Self-Employment Income

- Partnerships, Estates & Trusts K-1
- Self-employment Income 1099

Miscellaneous Income

- Alimony Received/ Paid
- Sale of Property
- Gambling or lottery winnings W-2G
- Rental Property Income/ Expenses
- Cancellation of Debt 1099-C
- Proceeds from Life Insurance

Tax Deductions

- IRA/SEP Contributions
- Self-employed Health Insurance
- Education Payments (1098-T)
- Student Loan Interest Paid
- HSA Contributions/ Deductions
- Moving Expenses
- Educator Expenses

Itemized Deductions

- Home Mortgage Interest 1098
- Home Equity Loan Interest
- Real Estate Taxes
- Closing Papers (HUD statement)
- Donations (goodwill)
- House of Worship
- Unreimbursed Work Expenses
- Prior Year Tax Preparation Fee
- Job Seeking Expenses
- Legal Fees to Protect Income
- Union & Professional Dues
- Gambling Losses (up to winnings)
- State Tax Payments or Refunds

Medical Expenses

- Doctors, Dentists, Nursing Care
- Eyeglasses and Contact lenses
- Insurance Premiums
- Orthopedic Aids & Equipment
- Prescription Medicines
- Transportation for Medical Attention

Miscellaneous Items

- Current 401K most Recent Statement
- Old 401K most Recent Statement
- Year End Brokerage Statement
- Cost basis of stock/bonds sold
- Life Insurance Statement
- Voided Check

Health Insurance

- Type of insurances**
(thru employer / healthcare.gov -
Affordable Care Act - Obamacare / Social
Security Medicare / Self employed)
- Form **1095-A / 1095-B / 1095-C**
by the case



Tax Season Hours of Operation:

Monday –Thursday 9:00 a.m.-8:00 p.m.
Friday 9:00 a.m.-7:00 p.m.
Saturday 10:00 a.m. – 2:00 p.m.
Saturday by appointment only

Notes:
