

**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
- Education Payments (1098-T)
- Student Loan Interest Paid
- HSA Contributions/ Deductions
- Educator Expenses

**Itemized Deductions**

- Home Mortgage Interest 1098
- Home Equity Loan Interest
- Real Estate Taxes
- Closing Papers (HUD statement)
- Donations (Goodwill)
- House of Worship
- 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

**Do you have a financial interest in or signature authority over a FOREIGN financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account? Tell us!**



**Health Insurance**

- Type of insurances** (circle all applicable)  
(thru employer / healthcare.gov - Affordable Care Act - Obamacare / Social Security Medicare / Private insurance)
- Form **1095-A HEALTHCARE**  
1095-B/1095-C all forms received



**Tax Season Hours of Operation:**

Monday - Thursday 9:00 a.m.-7:30 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: \_\_\_\_\_  
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\*\* Please visit our website at [www.legacyfsc.com](http://www.legacyfsc.com) for important forms and worksheets