

INCOME TAX CHECKLIST

INCOME ITEMS

- W2 from employer(s)
- Social Security
- 1099 for self employment
- 1099 from pension/annuity
- 1099 from retirement accounts
- 1099 from investment accounts
- 1099 for unemployment
- K1 from trust, estate, partnership, s-corp
- State/city refunds
- Rental income
- Alimony received
- Gambling/prize income
- Jury duty pay
- Sale of assets (stocks, real estate, etc.)
- Healthcare forms

ADJUSTMENT & DEDUCTION ITEMS

- Medical and dental expense
- State and local taxes
- Home mortgage interest
- Home equity line interest
- Moving expenses
- Property and real estate taxes
- Gifts of charity
- Gambling losses/expenses
- Education expenses
- Student loan interest
- Child-care expenses
- Adoption costs
- Alimony paid
- Retirement plan contributions
- Self employment expenses
- Qualifying home improvements
- Vehicle license fees