

# Printable Tax Documentation Checklist

## General Taxable Income

- ☐ Alimony Received or Paid
- ☐ Dividend Income Statements: Form 1099-DIV
- ☐ Interest Income Statements: Form 1099-INT & 1099-OID
- ☐ Miscellaneous Income: Form 1099-MISC
- ☐ Sales of Real Estate: Form 1099-S
- ☐ Sales of Stock, Land, etc.: Form 1099-B
- ☐ State Tax Refunds: Form 1099-G
- ☐ Unemployment Compensation Received
- ☐ W-2 Form(s) for Wages, Salaries, and Tips

## Retirement Income

- ☐ Railroad Retirement & Social Security Income: Form SSA-1099
- ☐ Retirement Income: Form 1099-R

## Business Income

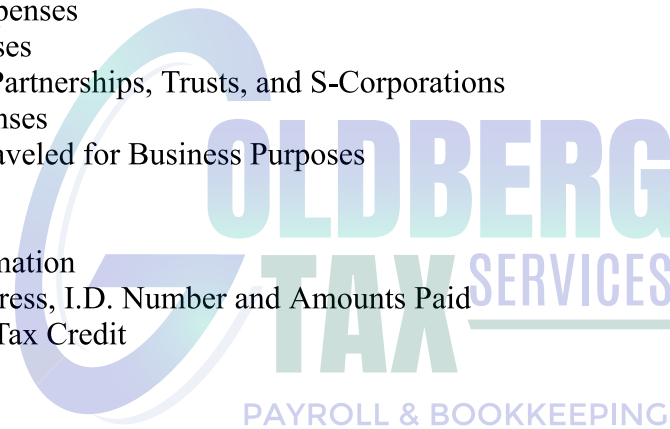
- ☐ Business Income and Expenses
- ☐ Farm Income and Expenses
- ☐ Form K-1 Income from Partnerships, Trusts, and S-Corporations
- ☐ Rental Income and Expenses
- ☐ Tax Deductible Miles Traveled for Business Purposes

## Tax Credits Checklist

- ☐ Adoption Expense Information
- ☐ Child Care Provider Address, I.D. Number and Amounts Paid
- ☐ First Time Home Buyer Tax Credit
- ☐ Foreign Taxes paid

## Expense and Tax Deduction Checklist

- ☐ Amount Paid to Professional Preparer Last Year
- ☐ Casualty and Theft Losses
- ☐ Charitable Cash Contributions
- ☐ Doctor and Dentist Payments
- ☐ Fair Market Value of Non-cash Contributions to Charities
- ☐ Home Mortgage Interest from Form 1098
- ☐ Home Second Mortgage Interest Paid
- ☐ Hospital and Nurse Payments
- ☐ Investment Expenses
- ☐ IRA Contributions
- ☐ Job-hunting Expenses
- ☐ Last Year's Tax Preparation Fee
- ☐ Medical Expenses for the Family
- ☐ Medical Insurance Paid
- ☐ Miles Traveled for Volunteer Purposes
- ☐ Miles Traveled for Medical Purposes
- ☐ Miles Traveled Related to Your Job
- ☐ Moving Expenses
- ☐ Personal Property Taxes Paid
- ☐ Prescription Medicines and Drugs



- ☐ Real Estate Taxes Paid
- ☐ State Taxes Paid with Last Year's Return (if itemized)
- ☐ Student Loan Interest Paid
- ☐ Tax Deductible Unreimbursed Expenses Related to Your Job
- ☐ Union and Professional Dues
- ☐ Unreimbursed Expenses Related to Volunteer Work

**Tax Estimate Payments Checklist**

- ☐ Estimated Tax Payments Made with ES Vouchers
- ☐ Last Year's Tax Return Overpayment Applied to This Year
- ☐ Off Highway Fuel Taxes Paid

**General Information**

- ☐ Bank Account Number (BAN) (For direct deposit/debit purposes)
- ☐ Child Care Expenses for Each Dependent
- ☐ Copy of Last Year's Tax Return
- ☐ Dependents' Names, Years of Birth, and Social Security Numbers
- ☐ Dependents' Post High School Educational Expenses
- ☐ Educational Expenses for You and Your Spouse
- ☐ Prior Year Adjusted Gross Income (AGI) & Personal Identification
- ☐ Routing Transmit Number (RTN) (For direct deposit/debit)
- ☐ Social Security Numbers for You and Your Spouse

