Checklist for documents and information

General Taxable Income

\_\_\_\_ W-2 Form(s) for Wages, Salaries and Tips

\_\_\_\_ Interest Income Statements: Form 1099-INT and 1099-OID

\_\_\_\_ Dividend Income Statements: Form 1099-DIV

\_\_\_\_ Sales of Stock, etc.: Form 1099-B

\_\_\_\_ Sales of Real Estate: Form 1099-S

\_\_\_\_ State tax refunds: Form 1099-G

\_\_\_\_ Alimony Received or Paid

\_\_\_\_ Unemployment Compensation Received

\_\_\_\_ Miscellaneous Income: Form 1099-MISC

\_\_\_\_ Cancellation of Debt: Form 1099-C

\_\_\_\_ Health Insurance Form 1099 HC

Retirement Income

\_\_\_\_ Retirement Income: Form 1099-R

\_\_\_\_ Social Security Income: Form SSA-1099

Business Income

\_\_\_\_ Summarized List of Business Income and Expenses

\_\_\_\_ Summarized List of Rental Income and Expenses

\_\_\_\_ Summarized List of Farm Income and Expenses

\_\_\_\_ Form K-1 Income from Partnerships, Trusts and S-Corporations

\_\_\_\_ Mileage for Tax Deductible Business Purposes (Include total mileage for the vehicle)

Tax Credits Checklist

\_\_\_\_ Child Care Provider Name, Address, ID Number and Amounts paid

\_\_\_\_ Adoption Expense Information

\_\_\_\_ College Education Form 1098-T and/or 1099-Q

Expense and Tax Deduction Checklist

\_\_\_\_ Medical Expenses for the Family (must exceed 10% AGI [7.5% over age 65])

\_\_\_\_ Home Mortgage Interest: Form 1098

\_\_\_\_ Real Estate Taxes Paid (if not on Form 1098)

\_\_\_\_ Personal Property (Excise) Taxes Paid

\_\_\_\_ Charitable Contributions - Cash, check, credit card - with receipt

\_\_\_\_ Charitable Contributions - Non-cash with receipt from charity indicating FMV of donated items

\_\_\_\_ Unreimbursed Job-related Expenses or Mileage

\_\_\_\_ Union and Professional Dues

\_\_\_\_ Investment Expenses

\_\_\_\_ Job-hunting Expenses

\_\_\_\_ Teacher Classroom Expenses Paid up to $250.00

\_\_\_\_ IRA Contributions (indicate if Regular or Roth)

\_\_\_\_ Student Loan Interest Paid: Form 1098-E

Tax Estimate Payments Checklist

\_\_\_\_ Estimated Tax Payments for 2014 tax year Federal and State (amounts and dates paid)