

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

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)