



# TAX FILING CHECKLIST

## NEW CLIENTS

- New Client Data Worksheet
- Copy of last year's tax return
- Birth Certificates for all Dependents
- Social Security Cards for everyone on return

---

## POSSIBLE INCOME ITEMS

- W2's from all employers
- Retirement (1099-R)
- Social Security (1099-SA)
- Interest (1099-INT)
- Dividends (1099-DIV)
- Unemployment (1099-G)
- Gambling / Lottery Winnings (W2-G)
- Rental Income
- Farming Income
- Marketplace Health Insurance (1095-A)
- Education or Scholarships (1099-Q)
- Virtual / Crypto Currency Summary
- Investments (1099-B)
- Sale of home or other assets (1099-S)
- Business Income (K-1)
- Self-Employment Income (1099-NEC / 1099-K)
- Cancellation of Debt (1099-C)
- Alimony Received
- Income from Hobbies
- Foreign Income

---

## POSSIBLE DEDUCTIONS & CREDITS

- Adoption Expenses
- IRA Contributions
- Property Taxes or Rent Paid
- K-12 Homeschool / Private School Expenses
- Contributions to 529 Plan
- Student Loan Interest (1098-E)
- Childcare Expenses including EIN/SSN of provider
- Estimated Tax Payments
- Self-Employed Business Expenses
- Teacher Educator Expenses
- Foreign Taxes Paid
- Energy Efficient Home Improvements
- Education Expenses (1098-T)
- Donations

Depending on your total deductions, you may also be able to deduct these items. To save yourself time, ask if you aren't sure before you gather the information.

- Medical Expenses, including mileage
- Sales Tax paid on large purchases
- Excise Tax paid on vehicles
- Mortgage Interest (1098)
- Charitable Mileage
- Non-Cash Donations

---

**THESE ARE THE MOST COMMON ITEMS, BUT IS NOT A COMPLETE LIST OF POSSIBLE ITEMS.**

**PLEASE INCLUDE ANY OTHER INFORMATION YOU THINK MAY APPLY.**