

TAX PREP CHECKLIST

INCOME

W-2'S	AMOUNT
INTEREST 1099-INT	
DIVIDEND 1099-DIV	
SOC SECURITY SSA-1099	
IRA, PENSIONS 1099-R	
STATE REFUND 1099-G	
UNEMPLOYMENT 1099-G	
STOCKS 1099-B	
SOLD REAL ESTATE 1099-S	
GAMBLING WINNINGS	
ALIMONY RECEIVED	
INSTALLMENT SALE	
CANCELLATION OF DEBT 1099-C	
K1	
EST PAYMENTS:	
APR	SEP
JUN	JAN

DEDUCTIONS

MEDICAL AND DENTAL	AMOUNT
MEDICAL	
DENTAL	
PRESCRIPTION	
INSURANCE PREMIUM	
GLASSES/CONTACTS	
HEARING AIDS	
OTHER	
MILES	
TAXES PAID	
REAL ESTATE	
PERSONAL PROPERTY	
STATE INCOME TAXES	
INTEREST PAID 1098	
1ST MORTGAGE	
2ND MORTGAGE	
CONTRIBUTIONS	
CASH	
NON-CASH	
MILES	
GAMBLING LOSSES	
CHILD CARE PROVIDER	
STUDENT LOAN 1098-E	
COLLEGE STUDENT TUITION 1098-T	
HSA CONTRIBUTIONS	
ALIMONY PAID	
CASUALTY LOSSES	
EDUCATOR EXPENSES	
IRA CONTRIBUTIONS	