

Taxpayer Checklist for Individuals

General Information

Full Name
Social Security Number
Date of Birth
Tax Return filed from previous tax year
Mailing Address
(This information is required for all individuals listed on the return)

Income Information

W2's
1099's Interest and Dividends
1095-A Health Insurance Marketplace Statement
1099's Retirement and Annuities
1099-Misc
1099-G
K1's from S Corporations or Partnerships
Social Security
Alimony Received
Mortgage Statements
Real Estate Tax Bills
Gambling Income and Losses

Deductions

Self Employed Health Insurance
Contributions to IRA
Contributions to SEP
Contributions to Keogh
Health Savings Account
Interest on Student Loan
Tuition and Fees Deduction



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Itemized Deductions

Medicare B&D Insurance Premiums
Prescriptions Medications
Out-of-Pocket Medical Visits
Eyeglasses and Contact Lenses and supplies
Physical Therapists
1098-Mortgage Interest Expenses
Real Estate Taxes Paid
Auto Registration Fees
List of Charitable Contributions
Cash & Noncash Gifts
Mileage Driven for Charity
Union Dues
Professional Dues
Job Related Education
Professional Licenses
Tools Used in Work
Work Clothes and Uniforms
Investment Expenses

Tax Credit and Deductions

Adoption Expenses
Child Care Expenses
1098-T Education Expenses

