

## ABBREVIATED CHECKLIST

DESCRIPTION	CHECK
Social Security Numbers of Taxpayer and Spouse	
Social Security Numbers of Dependents	
All W-2 Forms and All 1099 Forms	
IRA or other retirement plan withdrawal	
Taxable Interest (1099-INT)	
Taxable Dividend (1099-DIV)	
Sale of Securities (1099-B)	
State Refund (1099-G)	
Commissions and Fees (1099-MISC)	
Proof Of Healthcare (1099HC, 1095A, 1095B, 1095C)	
K1's From Partnerships, Joint Ventures, S Corporations, Estates or Trusts	
If you sold mutual funds or securities bring in what you originally paid for them and the date which you purchased and sold them.	
If you own rental property bring in the amount you received in rent as well as all expenses (i.e. Mortgage interest, repairs, utilities, taxes, insurance.)	
Unemployment compensation	
Social Security benefits received	
IRA contributions	
Student Loan Interest	
Contributions or intended contributions to an IRA	
Health insurance cost if self employed	
Alimony payments made. Include name and social security number of former spouse	
Teachers, bring cost of supplies	
<b>Itemized Deductions:</b>	
Medical Expenses (Subject to threshold)	
Sales Tax Paid (Amount can be used in place of state income tax)	
Real estate taxes <b>(Even if you don't typically itemize)</b>	
Excise taxes (paid on vehicles)	
Mortgage and home equity interest	
Points paid on purchase of new home or refinancing	
Charitable contributions	
Work related expenses in which you were not reimbursed (i.e.. Mileage) (Subject to threshold)	
Union dues and professional dues	
Tax preparation fees	
Safety deposit box rental	
<b>Credits:</b>	
Child care / dependent care expenses. <b>Note: Let us know if you are having dependent care expenses withheld tax deferred on your paycheck.</b>	
Education Expenses (Tuition and Fees) paid to eligible educational institution by taxpayer for themselves, spouse, or dependent of taxpayer claimed on tax return. Eligible institution is any accredited college, university, vocation school or other accredited post-secondary education institution (1098-T). <b>Please note that the 1098-T is often sent under the student's name.</b>	
<b>Taxes Paid:</b>	
All estimated payments made for both Federal and State	
<b>This checklist represents a summary of key items. If you have a questions on other items please contact our office directly at (978) 400-7050.</b>	