



INCOME TAX CHECKLIST

INCOME ITEMS

- W2 from employer
- Social Security (SSA-1099)
- 1099 from self employment
- 1099 from pension/annuity
- 1099 from retirement accounts
- 1099 from investment accounts
- 1099 from unemployment
- K1 from trust, estate, partnership, s-corp
- State/city refunds (1099-G)
- Gambling/prize income
- Jury duty pay
- Sale of assets (stocks, real estate, etc.)
- Income/expenses from sole proprietorship
- Income/expenses from rentals

ADJUSTMENT & DEDUCTION ITEMS

- Medical and dental expense
- State and local taxes
- Home mortgage interest
- Home equity line interest
- Property and real estate taxes
- Charity Contributions
- Gambling losses
- Education expenses
- Student loan interest
- Child-care expenses
- Adoption costs
- Retirement plan contributions
- 1095 healthcare form
- Qualifying home improvements
- Vehicle license fee

Disclaimer: This checklist is intended as a general guide for clients and is not an all-inclusive list. Additional information or documentation may be required based on your individual tax situation. If you are unsure of whether an item is income or a deduction, please ask!