

INCOME TAX CHECKLIST

Note: This list is not comprehensive. Any changes to your income tax status should be noted.

Personal Information - changes this year.

Taxpayer: _____ SSN: _____
 Spouse: _____ SSN: _____
 Address: _____
 New Dependents: _____

	<u>Name</u>	<u>SSN</u>	<u>DOB</u>
1	_____	. ____ . ____	____ / ____ / ____
2	_____	. ____ . ____	____ / ____ / ____
3	_____	. ____ . ____	____ / ____ / ____

INCOME

Please indicate which types of income items you have. Please supply all pertinent records.

_____ Alimony	_____ Rental Income & Expense
_____ State Income Tax Refund (1099G)	_____ Royalties
_____ Commissions	_____ Social Security Income (1099SSA)
_____ Dividends - (1099 DIV)	_____ Tips/Gratuities
_____ Interest - (1099 INT, 1099 OID)	_____ Unemployment Compensation (1099G)
_____ Pension/IRA Dist- (1099R)	_____ Wages - W-2's
_____ Foreclosure (1099A)	_____ Gambling (W-2G)
_____ Sale of securities/residence or other property	_____ Cancellation of debt (1099C)

**Please provide description, number of shares, date acquired, cost, date sold, sales price, closing statement.*

ITEMIZED DEDUCTIONS

Medical (Include Medical Miles)

_____ Hospital
 _____ Insurance premiums
 _____ Medical /Dental Dr's
 _____ Medical Drugs*

Estimated Taxes

_____ Federal and State
 _____ Balance of 20__ paid in 20__

Interest

_____ Home Mortgage Interest (including 1st and 2nd)
 _____ Other Interest (personal property, equity line, etc.)

Charitable Contributions

_____ Cash Contributions
 _____ Non-cash contributions
 _____ Other Contributions (motor vehicle 1098C)

** Ask your pharmacy for a year end print out*

Home/Refinance

_____ Purchase home-closing statement
 _____ Refinance home-closing statement

Taxes

_____ Real Estate
 _____ State/Local
 _____ Sales Tax
 (For Large Items)

OTHER DEDUCTIONS OR CREDITS

_____ Alimony Paid	_____ Job Hunting Expenses
_____ Child Care	_____ Moving Expenses
_____ Education Expenses	_____ Retirement Plan (IRA, KEOGH)
_____ Employee Expenses	_____ Tuition
_____ Employment Fees	

PROFIT OR LOSS FROM BUSINESS

_____ Advertising	_____ Pension & Profit Sharing
_____ Car/Truck Expenses	_____ Postage
_____ Commissions & Fees	_____ Receipts/Sales
_____ Employee Benefits	_____ Rent or Lease
_____ Insurance	_____ Repairs & Maintenance
_____ Interest	_____ Taxes and Licenses
_____ Internet Service	_____ Telephone
_____ Legal & Professional	_____ Travel & Meals
_____ Mileage	_____ Utilities
_____ Office Expense	_____ Wages