

Tax Checklist for Individuals

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

Taxpayer: _____ SSN: _____
 Spouse: _____ SSN: _____
 Phone: _____ Email: _____
 Address: _____

Dependents (name)	SSN	DOB

Please check all that apply:

Income:	Alimony Rec'd (date of divorce)	Rental Income/Expense	Wages - W-2's
	Social Security Income (1099SSA)	Royalties - (1099 MISC)	Gambling (W-2G)
	Sale-securities/home/property	Dividends - (1099 DIV)	Tips/Gratuities
	State Income Tax Refund (1099G)	Foreclosure (1099A)	Commissions
	Unemployment Received (1099G)	Other Income (1099)	Credit Card (1099K)
	Cancellation of debt (1099C)	Pension/IRA Dist- (1099R)	Health Ins (1095A,B,C)
	Sharing Economy Income (Uber, Lyft, Air BnB, etc.)	Interest - (1099 INT, 1099 OID)	
	Capital Gains (1099)	Digital Assets - (1099B)	
		Contractors (1099-NEC)	
Item Deductions	Federal and State Estimates	Medical /Dental Expenses	Cash Contributions (Receipts)
	State/Local Tax	Long Term Care Insurance	Non-cash contributions (Receipts)
	Real Estate Tax	Prescriptions	Vehicle Donations (motor vehicle 1098C)
	Home Mortgage Interest (1st & 2nd)	Hospital Expense	
	Refinance home-closing statement	Health Insurance premiums	
	Purchase home-closing statement	Prescriptions	
	Sales Tax (Receipts)	Other Medical Expenses	
Other Deduct. /Credits	Moving Expenses (military only)	Estimated Payments - copies of canceled checks	Copies of Social Security Cards
	Tuition	Alimony Pd (date of divorce)	Copies of Driver's License
	Education Expenses	Child Care	
	Health Savings Accounts	Self Employed Health Insurance	
	Sep/Ira Contributions		
	Student Loan Interest		
Profit/Loss from Business	Advertising	Legal & Professional	Repairs & Maintenance
	Car/Truck Expenses	Mileage	Payroll
	Commissions & Fees	Office Expense	Taxes and Licenses
	Employee Benefits	Payroll	Telephone
	Health Insurance	Pension/Profit Sharing	Travel & Meals
	Interest	Postage	Utilities
	Internet Service	Receipts/Sales	Wages Paid
	Insurance	Rent or Lease	Other Expenses