

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: | <input type="checkbox"/> | Alimony | <input type="checkbox"/> | Rental Income & Expense | | |
| | <input type="checkbox"/> | Commissions | <input type="checkbox"/> | Royalties | | |
| | <input type="checkbox"/> | Dividends - (1099 DIV) | <input type="checkbox"/> | Sale of securities/residence or other property | | |
| | <input type="checkbox"/> | Foreclosure (1099A) | <input type="checkbox"/> | Social Security Income (1099SSA) | | |
| | <input type="checkbox"/> | Gambling (W-2G) | <input type="checkbox"/> | State Income Tax Refund (1099G) | | |
| | <input type="checkbox"/> | Cancellation of debt (1099C) | <input type="checkbox"/> | Tips/Gratuities | | |
| | <input type="checkbox"/> | Interest - (1099 INT, 1099 OID) | <input type="checkbox"/> | Unemployment Compensation (1099G) | | |
| | <input type="checkbox"/> | Sharing Economy Income (Uber, Lyft, Air BnB, etc.) | <input type="checkbox"/> | Virtual Currencies (Bitcoin, etc.) | | |
| | <input type="checkbox"/> | Pension/IRA Dist- (1099R) | <input type="checkbox"/> | Wages - W-2's | | |
| Item Deductions | <input type="checkbox"/> | Insurance premiums | <input type="checkbox"/> | Cash Contributions | | |
| | <input type="checkbox"/> | Medical /Dental Expenses | <input type="checkbox"/> | Non-cash contributions | | |
| | <input type="checkbox"/> | Prescriptions | <input type="checkbox"/> | Other Contributions (motor vehicle 1098C) | | |
| | <input type="checkbox"/> | Federal and State Estimates | <input type="checkbox"/> | Purchase home-closing statement | | |
| | <input type="checkbox"/> | Real Estate Tax | <input type="checkbox"/> | Refinance home-closing statement | | |
| | <input type="checkbox"/> | State/Local Tax | <input type="checkbox"/> | Home Mortgage Interest (1st & 2nd) | | |
| | <input type="checkbox"/> | Sales Tax | <input type="checkbox"/> | Other Interest | | |
| Other | <input type="checkbox"/> | Alimony Paid | <input type="checkbox"/> | Retirement Plan (IRA, KEOGH) | | |
| | <input type="checkbox"/> | Child Care | <input type="checkbox"/> | Tuition | | |
| | <input type="checkbox"/> | Education Expenses | <input type="checkbox"/> | Employee Expenses | | |
| Profit/Loss from Business | <input type="checkbox"/> | Advertising | <input type="checkbox"/> | Legal & Professional | <input type="checkbox"/> | Repairs & Maintenance |
| | <input type="checkbox"/> | Car/Truck Expenses | <input type="checkbox"/> | Mileage | <input type="checkbox"/> | Taxes and Licenses |
| | <input type="checkbox"/> | Commissions & Fees | <input type="checkbox"/> | Office Expense | <input type="checkbox"/> | Telephone |
| | <input type="checkbox"/> | Employee Benefits | <input type="checkbox"/> | Pension & Profit Sharing | <input type="checkbox"/> | Travel & Meals |
| | <input type="checkbox"/> | Insurance | <input type="checkbox"/> | Postage | <input type="checkbox"/> | Utilities |
| | <input type="checkbox"/> | Interest | <input type="checkbox"/> | Receipts/Sales | <input type="checkbox"/> | Wages |
| | <input type="checkbox"/> | Internet Service | <input type="checkbox"/> | Rent or Lease | | |