

Tax year: _____ Checklist for _____

INCOME

- | FORM | DESCRIPTION |
|------------------------------------|---|
| <input type="checkbox"/> W-2 | Wage/Salaries/Tips |
| <input type="checkbox"/> 1099-B | Capital Gains/Losses |
| <input type="checkbox"/> 1099-C | Cancellation of Debt |
| <input type="checkbox"/> 1099-DA | Sales of Digital Assets |
| <input type="checkbox"/> 1099-DIV | Dividends |
| <input type="checkbox"/> 1099-G | Unemployment |
| <input type="checkbox"/> 1099-G | State/City Tax Refund |
| <input type="checkbox"/> 1099-INT | Interest |
| <input type="checkbox"/> 1099-MISC | Rents, Royalties |
| <input type="checkbox"/> 1099-NEC | Self-Employment |
| <input type="checkbox"/> 1099-Q | Education Disbursement |
| <input type="checkbox"/> 1099-R | Pension, IRS, Rollover |
| <input type="checkbox"/> 1099-S | Property Sale |
| <input type="checkbox"/> 1099-SA | HSA Disbursement |
| <input type="checkbox"/> W-2G | Gambling, Lottery |
| <input type="checkbox"/> SSA-1099 | Social Security |
| <input type="checkbox"/> RRB-1099 | Railroad Retirement |
| <input type="checkbox"/> | Alimony Received |
| | <i>[only if divorce final before 1/1/2019]</i> |
| <input type="checkbox"/> | Real Estate/Personal Property Rental |
| <input type="checkbox"/> | Scholarships/Fellowships |
| <input type="checkbox"/> | Gig Work (Airbnb, Uber, Taskrabbit, etc.) |
| | <i>Please provide form 1099-K/1099-NEC and Uber/Lyft Tax Summary.</i> |
| <input type="checkbox"/> | Final pay stub if paid tips or overtime |

DEDUCTIONS/CREDITS/TAXES

- | | |
|---------------------------------|--|
| <input type="checkbox"/> 1098-E | Student Loan Interest |
| <input type="checkbox"/> 1098-T | College Tuition/Fees/Books |
| <input type="checkbox"/> 1095-A | Marketplace Health Insurance |
| <input type="checkbox"/> | Alimony Paid |
| | <i>[only if divorce final before 1/1/2019]</i> |
| <input type="checkbox"/> | Childcare/Day Camp Expenses (child <13) |
| | <i>[Provider's name, address and Tax ID#]</i> |
| <input type="checkbox"/> | Household Employers (Nanny Tax) |
| <input type="checkbox"/> | IRA/SEP/Simple contributions |
| <input type="checkbox"/> | Roth IRA Contributions or Conversion |
| <input type="checkbox"/> | Teacher's Classroom Expenses - \$300 cap |
| <input type="checkbox"/> | HSA Contribution (other than thru W-2) |
| <input type="checkbox"/> | Adoption Expenses |
| <input type="checkbox"/> | Self-Employed Health Insurance Premiums |
| <input type="checkbox"/> | Qualified Passenger Vehicle Loan Interest |
| | <i>(need purchase agreement & VIN#)</i> |

Electric Vehicle Purchase

Provide Form 15400 Clean Vehicle Seller Report from dealership (if purchased before 09/30/25)

ITEMIZED DEDUCTIONS

Medical/Dental/Optical

[Medical total must exceed 7.5% of income to be deductions]

- ☐ Prescription Drugs
- ☐ Health Insurance Premiums
- [not including pre tax payroll deduction]*
- ☐ Long Term Care Insurance
- ☐ Number of Medical Miles
- ☐ Doctor/Dental/Hospital/Lab Feed
- ☐ Vision/Eyeglasses/Contacts
- ☐ Nursing Home Care
- ☐ Special Needs Education

Taxes Paid *[Taxes total capped at \$40,000]*

- ☐ Sales Tax *[Cars/Boats/RVs]*
- ☐ Primary Residence Property Taxes
- ☐ Other Property Taxes *[land/second home]*

Interest Paid

- ☐ Home Mortgage Interest *[Form 1098]*
- ☐ Home Equity Loans *[Form 1098]*
- [Must be used to buy/build/improve property securing debt.]*
- ☐ Investment Loans

Contributions

- ☐ Check/Credit Card/Appreciated Asset/Payroll Deductions
- [Each donation of \$250+ needs written acknowledgement from charity]*
- ☐ Goods
- [If over \$500, you must have a list of donated items, charity address, and the date of the donation. If over \$5,000, you need appraisal.]*
- ☐ Volunteer Expenses/Mileage

Miscellaneous

- ☐ Virtual Currency Transactions
- ☐ Foreign Financial Account
- ☐ Foreign Trust
- ☐ Casualty Loss *[Federal or State declared disaster only]*
- ☐ Gambling Losses *[cannot exceed winnings]*
- ☐ Record of estimated tax payments made
- ☐ 1099-K – Payment card & Third party network transactions

Residential Energy Improvements

Provide receipts for: Exterior doors, windows, insulation, central air conditioners, water heater, solar panels, heat pumps, etc.

Revised: 01/14/2026