

Tax year: \_\_\_\_\_ Checklist for \_\_\_\_\_

INCOME		ITEMIZED DEDUCTIONS
<b>FORM</b>	<b>DESCRIPTION</b>	
<input type="checkbox"/> W-2	Wage/Salaries/Tips	<b>Medical/Dental/Optical</b> [Medical total must exceed 7.5% of income to be deductions]
<input type="checkbox"/> 1099-B	Capital Gains/Losses	<input type="checkbox"/> Prescription Drugs
<input type="checkbox"/> 1099-C	Cancellation of Debt	<input type="checkbox"/> Health Insurance Premiums [not including pre tax payroll deduction]
<input type="checkbox"/> 1099-DA	Sales of Digital Assets	<input type="checkbox"/> Long Term Care Insurance
<input type="checkbox"/> 1099-DIV	Dividends	<input type="checkbox"/> Number of Medical Miles
<input type="checkbox"/> 1099-G	Unemployment	<input type="checkbox"/> Doctor/Dental/Hospital/Lab Feed
<input type="checkbox"/> 1099-G	State/City Tax Refund	<input type="checkbox"/> Vision/Eyeglasses/Contacts
<input type="checkbox"/> 1099-INT	Interest	<input type="checkbox"/> Nursing Home Care
<input type="checkbox"/> 1099-MISC	Rents, Royalties	<input type="checkbox"/> Special Needs Education
<input type="checkbox"/> 1099-NEC	Self-Employment	
<input type="checkbox"/> 1099-Q	Education Disbursement	
<input type="checkbox"/> 1099-R	Pension, IRS, Rollover	<b>Taxes Paid</b> [Taxes total capped at \$40,000]
<input type="checkbox"/> 1099-S	Property Sale	<input type="checkbox"/> Sales Tax [Cars/Boats/RVs]
<input type="checkbox"/> 1099-SA	HSA Disbursement	<input type="checkbox"/> Primary Residence Property Taxes
<input type="checkbox"/> W-2G	Gambling, Lottery	<input type="checkbox"/> Other Property Taxes [land/second home]
<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>		<b>Interest Paid</b>
<input type="checkbox"/> Real Estate/Personal Property Rental		<input type="checkbox"/> Home Mortgage Interest [Form 1098]
<input type="checkbox"/> Scholarships/Fellowships		<input type="checkbox"/> Home Equity Loans [Form 1098] [Must be used to buy/build/improve property securing debt.]
<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"/> Investment Loans
<input type="checkbox"/> Final pay stub if paid tips or overtime		
DEDUCTIONS/CREDITS/TAXES		<b>Contributions</b>
<input type="checkbox"/> 1098-E	Student Loan Interest	<input type="checkbox"/> Check/Credit Card/Appreciated Asset/Payroll Deductions [Each donation of \$250+ needs written acknowledgement from charity]
<input type="checkbox"/> 1098-T	College Tuition/Fees/Books	<input type="checkbox"/> 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.]
<input type="checkbox"/> 1095-A	Marketplace Health Insurance	<input type="checkbox"/> Volunteer Expenses/Mileage
<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>		<b>Miscellaneous</b>
<input type="checkbox"/> Household Employers (Nanny Tax)		<input type="checkbox"/> Virtual Currency Transactions
<input type="checkbox"/> IRA/SEP/Simple contributions		<input type="checkbox"/> Foreign Financial Account
<input type="checkbox"/> Roth IRA Contributions or Conversion		<input type="checkbox"/> Foreign Trust
<input type="checkbox"/> Teacher's Classroom Expenses - \$300 cap		<input type="checkbox"/> Casualty Loss [Federal or State declared disaster only]
<input type="checkbox"/> HSA Contribution (other than thru W-2)		<input type="checkbox"/> Gambling Losses [cannot exceed winnings]
<input type="checkbox"/> Adoption Expenses		<input type="checkbox"/> Record of estimated tax payments made
<input type="checkbox"/> Self-Employed Health Insurance Premiums		<input type="checkbox"/> 1099-K – Payment card & Third party network transactions
<input type="checkbox"/> Qualified Passenger Vehicle Loan Interest (need purchase agreement & VIN#)		
<b>Electric Vehicle Purchase</b>		<b>Residential Energy Improvements</b>
Provide Form 15400 Clean Vehicle Seller Report from dealership (if purchased before 09/30/25)		