

1040 TAX DOCUMENT CHECKLIST

SECTION 1: GENERAL TAXABLE INCOME

- W-2 Form(s) for Wages, Salaries, and Tips
- Interest Income Statements: Form 1099-INT & 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
- Sales of Real Estate: Form 1099-S
- State Tax Refunds: Form 1099-G
- Alimony Received or Paid
- Unemployment Compensation Received
- Miscellaneous Income: Form 1099-MISC

SECTION 2: RETIREMENT INCOME

- Retirement Income: Form 1099-R
- Social Security Income and Railroad Retirement Income: Form SSA-1099

SECTION 3: BUSINESS INCOME

- Business Income and Expenses
- Rental Income and Expenses
- Farm Income and Expenses
- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Tax Deductible Miles Traveled for Business Purposes

SECTION 4: TAX CREDIT

- Child Tax Credit
- Child Care Provider Address, I.D. Number and Amounts Paid for the Child and Dependent Care Credit
- Earned Income Tax Credit (EITC)
- Adoption Expense Information for the Adoption Credit
- Foreign Taxes paid
- First Time Home Buyer Tax Credit

SECTION 5: EXPENSES AND TAX DEDUCTIONS

- Medical Expenses for the Family (if above 7.5% of your income)
- Home Mortgage Interest from Form 1098
- Home Second Mortgage Interest Paid
- Real Estate Taxes Paid
- State Taxes Paid with Last Year's Return (if claiming itemized deductions)
- Personal Property Taxes Paid
- Charitable Cash Contributions
- Fair Market Value of Non-cash Contributions to Charities
- Unreimbursed Expenses Related to Volunteer Work
- Tax Deductible Mileage for Volunteer Purposes
- Casualty and Theft Losses
- IRA Contributions
- Student Loan Interest Paid

SECTION 6: TAX ESTIMATE PAYMENTS

- Estimated Tax Payments Made with ES Vouchers
- Last Year's Tax Return Overpayment Applied to This Year
- Off Highway Fuel Taxes Paid

SECTION 7: GENERAL INFORMATION

- Educational Expenses for You and Your Spouse
- Dependents' Post High School Educational Expenses
- Child Care Expenses for Each Dependent

QUESTIONS?

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