

taxchecklist

{personal}

- social security numbers
- child care provider information

{employment & income}

- employment income (W-2)
- miscellaneous income (1099s, etc.)
- state and local income tax refunds
- investment income & expenses

{mortgage & rental}

- address(es)
- mortgage interest (1098)
- sale of real estate (1099-S)
- real estate taxes
- rent paid
- moving expenses

{self-employment}

- income records (1099-MISC)
- business expense records
- taxes paid
- home office deduction records

{deductions}

- charitable gifts
- qualifying volunteer expenses
- qualifying job expenses
- childcare expenses
- medical expenses
- adoption expenses
- alimony paid
- tax return preparation fees

{miscellaneous}

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