

# 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}

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_