



TAX RECORD CHECKLIST

BELOW IS A GENERAL LIST OF ITEMS NEEDED TO PREPARE YOUR TAX RETURN. PLEASE BRING IN THE ITEMS THAT APPLY TO YOUR SPECIFIC SITUATION.

Income

- ☐ All W-2's
- ☐ Unemployment Compensation
- ☐ Other employee compensation
- ☐ Social Security and railroad retirement benefits
- ☐ Pensions and Annuities
- ☐ Interest and dividends
- ☐ Sales of stock, personal residence and other property
- ☐ Rents and royalties
- ☐ Business and farm income
- ☐ Partnership and Trust Income
- ☐ Gambling and lottery winnings
- ☐ Other miscellaneous income
- ☐ State and local income tax refunds
- ☐ Scholarships and fellowships

Deductions and Credits

- ☐ Tax return preparation fees
- ☐ Medical expenses and medical mileage
- ☐ Home mortgage interest
- ☐ Real and personal property taxes
- ☐ Charitable contributions, both cash and property
- ☐ Union and professional dues
- ☐ Out-of-pocket expenses for volunteer services
- ☐ Child and disabled-dependent care expenses
- ☐ Job-seeking expenses
- ☐ IRA and Keogh plan contributions
- ☐ Business expenses by category
- ☐ Expenses for business use of car/mileage
- ☐ State and local income tax payments
- ☐ Qualified educational expense
- ☐ 529 college savings account contributions
- ☐ Moving expenses
- ☐ Vocational and job-related expense
- ☐ Health Savings Account Distributions