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Ste 305
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Individual Tax Preparation Checklist

Income Information

- Wages (Form W2)
- Interest Income (Form 1099-INT)
- Foreign bank accounts, income or paid taxes
- Dividend Income (Form 1099-DIV)
- Stock Sale/ Capital Gains (Form 1099-B)
 - Each stock sale: Date, # shares, price
- Crypto currency
- Other Income
 - Alimony, unemployment comp, debt cancellation, disability income, jury duty
- Rental Property (1099-MISC)
 - Related Expenses (Excel Preferred)
- Schedule K-1
- Pension Distribution (Form 1099-R)
- Social Security Benefits (Form 1099-SSA)
- State/ Local Refunds (Form 1099-G)
- Gambling Income (Form W-2G)
- Scholarships (Form 1098-T)
- Education Savings (Form 1099-Q)
- Bartering Income (Form-B)

Deduction Information

- IRA Contribution
- SEP, Simple, Keogh Plans
- Student Loan Interest (Form 1098-E)
- Student Expenses (Forms 1098-T/Q)
- Alimony Paid
 - Recipient Name & SSN
- Mortgage Interest (Form 1098)
- Investment Interest
- Charitable Contribution Receipts
- Business or Disaster Casualty/Theft Loss
- Medical Expenses
 - Health Insurance
 - Out of Pocket Expenses
 - Form 1095-A, 1095-B, 1095-C
 - Healthcare Market Place Exemption
 - Medical Account Contribution
- Real Estate Taxes
- Property Taxes
- Other Taxes (Including sales tax paid on purchase of autos, boats, RVs for personal use)

Credit and Payment Information

- Child Care Expenses
- Estimated Tax Payments
 - Date and Amount Paid
- Tuition Statements (Form 1098-T)
 - Education Expenses
- Voided Check or Bank Info for Direct Deposit/Withdraw
- Energy or Electric Vehicle Tax Credit Info
- Advance Child Tax Credit Payment
- Economic Impact/Stimulus Payment