

# Tax Appointment Checklist

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You can check off the items you have as you prepare for your tax return appointment.

## 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 Retirement Income
- Retirement Income: Form 1099-R
- Social Security Income and Railroad Retirement Income: Form SSA-1099 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 Tax Credits
- Child Care Provider Address, I.D. Number and Amounts Paid
- Adoption Expense Information
- Foreign Taxes Paid
- First Time Home Buyer Tax Credit Expenses and Tax Deductions
- Medical Expenses for the Family
- Medical Insurance Paid
- Prescription Medicines and Drugs
- Doctor and Dentist Payments
- Hospital and Nurse Payments
- Tax Deductible Miles Traveled for Medical Purposes
- 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
- Amount Paid to Professional Preparer Last Year
- Unreimbursed Expenses Related to Your Job
- Miles Traveled Related to Your Job
- Union and Professional Dues
- Investment Expenses
- Job-hunting Expenses
- IRA Contributions
- Student Loan Interest Paid
- Moving Expenses
- Last Year's Tax Preparation Fee 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 General Information
- Copy of Last Year's Tax Return
- Social Security Numbers for You and Your Spouse
- Educational Expenses for You and Your Spouse
- Dependents' Names, Years of Birth, and Social Security Numbers
- Dependents' Post High School Educational Expenses
- Child Care Expenses for Each Dependent
- Prior Year Adjusted Gross Income (AGI) & Personal Identification Number (PIN)-how to find last year's adjusted gross income (AGI)
- Routing Transmit Number (RTN) (For direct deposit/debit purposes)
- Bank Account Number (BAN) (For direct deposit/debit purposes)