

Checklist

Income:

- Form(s) W-2 & W-2G
- Form(s) 1099 (DIV, INT, MISC, NEC, G, K, B)
- SSA-1099
- Form(s) K-1 (Partnerships, S Corporations, Fiduciaries)
- Sale of assets or property
- Cancellation of debt
- Alimony received (include date of divorce)
- Other income _____

Payments:

- Educator classroom expenses
- Alimony (include name, SS# of payee, and date of divorce)
- Student loan interest
- Contributions to HSA
- Contributions to IRAs and other retirement plans
- Tuition and fees for higher education (Form 1098-T)
- Medical and dental expenses
- Real estate taxes
- Other state and local taxes
- Mortgage interest
- Cash contributions
- Noncash contributions (include donee organization info if over \$500)
- Gambling losses
- Rent
- Other payments _____

Health Insurance:

- Form HC for each carrier you had during the year
- Form 1095-A if subsidized through Obamacare/Marketplace

Business &/or Real Estate Activities:

- Income & expenses
- Fixed asset purchases
- Related mileage per vehicle used:

Miscellaneous:

- Notice CP01A – Identity Protection PIN
- Voided check for direct debit or deposit
- Signed engagement letter
- Completed questionnaire
- Taxpayer email and phone number