

CHECKLIST - TAX 2022

Filing Status:

I DECLARE THAT I HAVE BROUGHT THE DOCUMENTS SELECTED BELOW:

BASICS FOR ALL FILERS
ID/Passport or Driver's License
Copy of Latest or Last Year's Tax Return
Name, SSN, ITIN, Dates of Birth of each individual added in Tax Return Child
Care Expenses for each dependent
Proof of Address for each dependent
Birth Certificate for each dependent
Marriage Certificate
Bank Name
Routing Number (For Direct deposit/debit purposes)
Bank Account Number (For Direct deposit/debit purposes)
SOURCES OF INCOME
W-2 Form(s) for Wages, Salaries, and Tips
Non-employment Compensation: Form 1099-NEC
Business Income and Expenses Form K. 1 Income from Partnerships Trusts, and S. Corporations
Form K-1 Income from Partnerships, Trusts, and S-Corporations Unampleyment Compensation reseived: Form 1000 G
☐ Unemployment Compensation received: Form 1099-G ☐ Interest Income Statements: Form 1099-INT & 1099-OID
☐ Compensation: 1099-K
Social Security Income and Railroad Retirement Income: Form SSA-1099
Surplus Income Statements: Form 1099-DIV
Sales of Stock, Land, etc. for Capital Gains: Form 1099-B W2G
Sales of Real Estate: Form 1099-S
Rental Income and Expenses
State Tax Refunds: Form 1099-G
Alimony received or paid
☐ Miscellaneous Income: Form 1099-MISC
TAX CREDITS
Child Tax Credit Child
Care Provider Name, Address, EIN or SSN/ITIN and Amounts Paid Earned
Income Tax Credit (EITC)

TAX DEDUCTIONS AND EXPENSES Home Mortgage Interest from Form 1098 Home Second Mortgage Interest Paid student Loan Interest Paid from Form 1098 Moving Expenses Medical Expenses for the Family Prescription Medicines and Drugs Tax Deductible Miles Traveled for Medical Purposes 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 Reimbursed Expenses Related to Volunteer Work Casualty and Theft Losses Reimbursed Expenses Related to Your Job Union and Professional Dues investment Expenses Job-hunting Expenses IRA Contributions HSA, FSA Contributions TAX ESTIMATE PAYMENTS Estimated Tax Payments Made with ES Vouchers or Online Last Year's Tax Return Over-Payment Applied to This Year Off Highway Fuel Taxes Paid HEALTH INSURANCE 1095-A - Health Insurance Marketplace Statement 1095-B or C - Health Insurance Coverage SIGNATURE: DATE:	Adoption Expense Information for the Adoption Tax Credit First Time Home Buyer Tax Credit
Home Second Mortgage Interest Paid Student Loan Interest Paid from Form 1098 Moving Expenses Medical Expenses for the Family Prescription Medicines and Drugs Tax Deductible Miles Traveled for Medical Purposes 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 Reimbursed Expenses Related to Volunteer Work Casualty and Theft Losses Reimbursed Expenses Related to Your Job Union and Professional Dues Investment Expenses Job-hunting Expenses IRA Contributions HSA, FSA Contributions TAX ESTIMATE PAYMENTS Estimated Tax Payments Made with ES Vouchers or Online Last Year's Tax Return Over-Payment Applied to This Year Off Highway Fuel Taxes Paid HEALTH INSURANCE 1095-A - Health Insurance Marketplace Statement 1095-B or C - Health Insurance Coverage SIGNATURE:	TAX DEDUCTIONS AND EXPENSES
Student Loan Interest Paid from Form 1098 Moving Expenses Medical Expenses for the Family Prescription Medicines and Drugs Tax Deductible Miles Traveled for Medical Purposes 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 Reimbursed Expenses Related to Volunteer Work Casualty and Theft Losses Reimbursed Expenses Related to Your Job Union and Professional Dues Investment Expenses Job-hunting Expenses Jac Contributions HSA, FSA Contributions HSA, FSA Contributions TAX ESTIMATE PAYMENTS Estimated Tax Payments Made with ES Vouchers or Online Last Year's Tax Return Over-Payment Applied to This Year Off Highway Fuel Taxes Paid HEALTH INSURANCE 1095-A - Health Insurance Marketplace Statement 1095-B or C - Health Insurance Coverage SIGNATURE:	Home Mortgage Interest from Form 1098
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Prescription Medicines and Drugs Tax Deductible Miles Traveled for Medical Purposes 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 Reimbursed Expenses Related to Volunteer Work Casualty and Theft Losses Reimbursed Expenses Related to Your Job Union and Professional Dues Investment Expenses Job-hunting Expenses IRA Contributions HSA, FSA Contributions TAX ESTIMATE PAYMENTS Estimated Tax Payments Made with ES Vouchers or Online Last Year's Tax Return Over-Payment Applied to This Year Off Highway Fuel Taxes Paid HEALTH INSURANCE 1095-A - Health Insurance Marketplace Statement 11095-B or C - Health Insurance Coverage SIGNATURE:	Student Loan Interest Paid from Form 1098 Moving Expenses
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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 Reimbursed Expenses Related to Volunteer Work Casualty and Theft Losses Reimbursed Expenses Related to Your Job Union and Professional Dues Investment Expenses Job-hunting Expenses IRA Contributions HSA, FSA Contributions TAX ESTIMATE PAYMENTS Estimated Tax Payments Made with ES Vouchers or Online Last Year's Tax Return Over-Payment Applied to This Year Off Highway Fuel Taxes Paid HEALTH INSURANCE 1095-A - Health Insurance Marketplace Statement 1095-B or C - Health Insurance Coverage SIGNATURE:	Prescription Medicines and Drugs
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Fair Market Value of Non-cash Contributions to Charities Reimbursed Expenses Related to Volunteer Work Casualty and Theft Losses Reimbursed Expenses Related to Your Job Union and Professional Dues Investment Expenses Job-hunting Expenses IRA Contributions HSA, FSA Contributions TAX ESTIMATE PAYMENTS Estimated Tax Payments Made with ES Vouchers or Online Last Year's Tax Return Over-Payment Applied to This Year Off Highway Fuel Taxes Paid HEALTH INSURANCE 1095-A - Health Insurance Marketplace Statement 1095-B or C - Health Insurance Coverage SIGNATURE:	Personal Property Taxes Paid
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Casualty and Theft Losses Reimbursed Expenses Related to Your Job Union and Professional Dues Investment Expenses Job-hunting Expenses IRA Contributions HSA, FSA Contributions TAX ESTIMATE PAYMENTS Estimated Tax Payments Made with ES Vouchers or Online Last Year's Tax Return Over-Payment Applied to This Year Off Highway Fuel Taxes Paid HEALTH INSURANCE 1095-A - Health Insurance Marketplace Statement 1095-B or C - Health Insurance Coverage SIGNATURE:	Fair Market Value of Non-cash Contributions to Charities Reimbursed
Reimbursed Expenses Related to Your Job Union and Professional Dues Investment Expenses Job-hunting Expenses IRA Contributions HSA, FSA Contributions TAX ESTIMATE PAYMENTS Estimated Tax Payments Made with ES Vouchers or Online Last Year's Tax Return Over-Payment Applied to This Year Off Highway Fuel Taxes Paid HEALTH INSURANCE 1095-A - Health Insurance Marketplace Statement 1095-B or C - Health Insurance Coverage 1099HC - Health Insurance Coverage	Expenses Related to Volunteer Work
Union and Professional Dues Investment Expenses Job-hunting Expenses IRA Contributions HSA, FSA Contributions TAX ESTIMATE PAYMENTS Estimated Tax Payments Made with ES Vouchers or Online Last Year's Tax Return Over-Payment Applied to This Year Off Highway Fuel Taxes Paid HEALTH INSURANCE 1095-A - Health Insurance Marketplace Statement 1095-B or C - Health Insurance Coverage 1099HC - Health Insurance Coverage	Casualty and Theft Losses
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□ Job-hunting Expenses □ IRA Contributions □ HSA, FSA Contributions □ TAX ESTIMATE PAYMENTS □ Estimated Tax Payments Made with ES Vouchers or Online □ Last Year's Tax Return Over-Payment Applied to This Year Off Highway Fuel □ Taxes Paid □ HEALTH INSURANCE □ 1095-A - Health Insurance Marketplace Statement □ 1095-B or C - Health Insurance Coverage □ 1099HC - Health Insurance Coverage	Union and Professional Dues
□ IRA Contributions □ HSA, FSA Contributions TAX ESTIMATE PAYMENTS □ Estimated Tax Payments Made with ES Vouchers or Online □ Last Year's Tax Return Over-Payment Applied to This Year Off Highway Fuel □ Taxes Paid HEALTH INSURANCE □ 1095-A - Health Insurance Marketplace Statement □ 1095-B or C - Health Insurance Coverage □ 1099HC - Health Insurance Coverage	Investment Expenses
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