



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) _____
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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
 - Unemployment Compensation received: Form 1099-G _____
 - Interest Income Statements: Form 1099-INT & 1099-OID _____
 - Compensation: 1099-K _____
 - Income: Form 1099-R _____
 - 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 _____
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TAX CREDITS

- Child Tax Credit Child
- Care Provider Name, Address, EIN or SSN/ITIN and Amounts Paid Earned
- Income Tax Credit (EITC)

Adoption Expense Information for the Adoption Tax Credit

First Time Home Buyer Tax Credit

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

1099HC - Health Insurance Coverage

SIGNATURE: _____

DATE: _____