



Tax Form Checklist

Forms You Will Need

These forms are a guide and may or may not pertain to you. Check off all forms that you will include in your tax return.

	Details/List	Yes	How Many?
Income	W-2(s) _____		
Business Income	1099-Misc _____		
Mortgage Interest	1098(s) _____		
Interest Income	1099-INT _____		
Dividend Income	1099 DIV _____		
Pensions, Annuities	1099-R _____		
IRA Distributions	1099(s) _____		
Rollovers Rents/Royalties	Schedule E _____		
Partnerships	K-1(s) _____		
S Corporation	K-1(s) _____		
Estates and Trusts	K-1(s) _____		
Unemployment Compensation	1099 G _____		
Social Security Benefits Received	SA-1099 _____		
State/Local Tax Refund(s) Received	_____		
Other Income (Lottery or Casino winnings)	_____		
How many states did you reside in last year?	<i>Please list.</i>		
How many states did you work in last year?	<i>Please list.</i>		
Moving Expenses	<i>Select states only.</i>		
<i>*Healthcare Forms</i>	<i>Imperative that this is included.</i>		
	1095-A _____		
	1095-B _____		
	1095-C _____		

How
Details/List Yes many?

Child and Dependent Care		_____
Tuition and Fee's	1098-T	_____
Scholarships/Fellowships	1098-E	_____
Foreign Tax Credits		_____
Medical and Dental Expenses	Transportation & Prescriptions	_____
Charitable Contributions		_____
Automobile Use (1099 Income)		_____
Earned Income Credit		_____
Business Expenses for your 1099 Income		_____
Home Office		_____
Stock Options/Restricted Stock		_____
Capital Gains and Losses/Other Gains and Losses		_____
*List number of transactions for Gains/Losses Above		_____

List any other forms or information that is to be included on the return that was not listed above.
