Paula Huggins CPA - Personal Income Tax Information Checklist

INCOME:

Form	Description
W2	Wages from Job
1099-R	Retirement/Pensions
SSA-1099	Social Security
1099INT	Interest Income
1099DIV	Dividend Income
1099B	Stock Sale Transactions
1099C	Cancellation of Debt
1099G	Unemployment/State Payments
1099MISC	Contract Income (Could be included in summaries)

Additional Types of Income

Business Income (See Schedule C Tax Summary)
Farm Income (See Farm Tax Summary)
Rental Income (See Rental Tax Summary)

Form K1: Income from a Scorp, Partnership, or Trust
Other: Any other income received
Could include gambling winnings, prizes, alimony,etc.

ADJUSTMENTS

Educator Expenses
Alimony Paid
HSA Contributions
IRA Contributions
Student Loan Interest

ITEMIZED DEDUCTIONS:

Medical (Must be > 10% of AGI) *Expenses must be what was paid, not what was incurred. Please total these expenses.*

Hospital bills paid
Doctor visits and co pays
Supplement & long term care insurance
Dental & eye care expenses
Medical Miles

Taxes Paid

Prior Year State Income Taxes
City / Local Taxes Paid
Real Estate Taxes
Sales Tax (if you are not going to be using state & local income taxes paid)
Personal Property Taxes

Interest Paid

Mortgage Interest

Charitable Contributions

Check/Cash Contributions
Non Cash Contributions
Charitable Miles
Volunteer Expenses

* All contributions must be made to a recognized 501 c(3) organization or church.
* Non cash contributions generally include clothing, household items, and furniture. *Ex: Goodwill & Salvation Army*
* It is required to have a receipt from the organization for cash donations above $250, but we will also need documentation or written verification for other cash/check contributions as well.
* Please remember that you need to obtain a receipt for ***ALL*** noncash contributions. It needs to include the organization and their federal identification number, date, and calculated value. It is also recommended to attach a list of the items donated. A valuation guide for items is available to print on the website.

CREDITS:

Education Credits: Must obtain a form 1098T from the university
Child/Dependent Care: Must obtain a letter stating tax id number, address, and amount paid

DEPENDENT INFORMATION

Required items: Legal name, social security number, relationship, date of birth, amount of time lived in home, and address verification. *Ex: school records or medical records*

OTHER MISCELLANEOUS ITEMS

Health Insurance Statement: This is only required if you have insurance through the marketplace (Form 1095A)
Direct Deposit Bank Information: If you receive a refund and want your refund directly deposited to a bank account, we will need the bank name, rounding number, and account number.

If you have any questions please feel free to contact the office at (573) 339-7676