

Walton Tax Center

6978 Dixie Hwy Suite B

Clarkston, MI 48346

248.625.9000

Tax Preparation Checklist

Personal Information

- Name
- Date of Birth
- Social Security Card /ITIN/ATIN
- Last Year's Tax Return
- Valid Driver's License

Income and Tax Information

- W-2's
- Interest (1099-INT or substitute)
- Dividend Slips (1099-DIV or substitute)
- Stock Sales (1099-B or Broker Statement)
- Self-employment Income & Expenses
- Sale of a Personal Residence
- Rental Income and Expenses
- Sale of any Business Assets
- Rental Income and Expenses
- Sale of any Business Assets
- Gambling or Lottery Winnings
- State Income Tax Refund
- Pension Income (1099-R)
- Estimated Taxes Paid
- Social Security or Railroad Retirement
- IRA or 401(k) Distribution
- Unemployment Compensation
- Miscellaneous Income (1099-MISC)

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Deductions and Adjustments

- Medical Expenses
- Real Estate or Personal Property Taxes
- Mortgage Interest
- Charitable Contributions
- Gambling Losses
- Moving Expenses
- Traditional IRA Contributions
- Higher Education Expenses
- Educator Expenses
- Student Loan Interest

Tax Credits

- Child Care Provider/Address and Employer Identification Number (EIN) or Social Security Number (SSN)
- Adoption Expenses
- Retirement Savings Contributions
- College tuition-(form 1098-T)