



Tax Return Client Checklist

INCOME DOCUMENTATION

- ☐ *W-2 Statements* - from all employers, all copies
- ☐ *1099 Statements* - from banks, mutual funds, stocks, retirement accounts, business income, 3rd party payment apps
- ☐ *State Tax Refunds* - only if you itemized deductions last year
- ☐ *Alimony Received* - this is not child support
- ☐ *Capital Gains and Losses* - cost basis of stock or other investments sold
- ☐ *Crypto Currency* (Bitcoin) treated like a purchase and sale of stock
- ☐ *Social Security income*
- ☐ *Unemployment income*

SELF-EMPLOYED INCOME – need income and all expenses

RENTAL INCOME – need income and all expenses

ADJUSTMENTS TO INCOME

- ☐ *IRA or Roth IRA Contributions* - exact amount needed
- ☐ *Student Loan Interest* - most lenders send a 1098-E or go to their website
- ☐ *Educator Expenses* - up to \$300 per teacher can be deducted
- ☐ *Alimony Paid* - not child support; divorces prior to 2019 only
- ☐ *Health Savings Account contributions* – those not included on a W2

CREDITS

- ☐ *Energy Efficient Home Improvement Credit* – up to 30% of total improvement cost
- ☐ *Residential Clean Energy Credit* – solar, geothermal installation cost
- ☐ *Education Credit* - form 1098 from college tuition statement
- ☐ *Child or Dependent Care Expenses* - need receipt, amount paid, name, address, and social security number or tax ID# of provider.
- ☐ *Adoption Credit*

DEDUCTIONS – totals must exceed standard deduction (\$ \$15750, MFJ \$31500, HOH \$23625)

- ☐ *Medical Expenses* - including doctors, dentists, hospitals, prescriptions, travel (must exceed 7.5% of AGI)
- ☐ *State & Local Income Taxes Paid* - available on W-2's
- ☐ *Property Taxes* - form 1098 from mortgage company or amount paid if not escrowed
- ☐ *Auto Excise Taxes* - excise & wheel tax from vehicle registration
- ☐ *Mortgage Interest Paid* - form 1098 from mortgage company
- ☐ *Charitable Contributions* - both cash and non-cash donations
- ☐ *Casualty or theft losses* - if loss occurred in a federally declared disaster area
- ☐ *Gambling Losses* - if claiming gambling winnings

INDIANA DEDUCTIONS AND CREDITS

- ☐ *Renters Deduction* - total rent paid, name and address of landlord
- ☐ *Property Tax Deduction*
- ☐ *College Donation Credit* - donations made to Indiana colleges and universities
- ☐ *Private School/Homeschool* – based on number of dependents enrolled
- ☐ *Indiana College Choice 529 Contributions* - contributions to Indiana plan & account number
- ☐ *Neighborhood Assistance Credit* - donations to certain qualified Indiana charities
- ☐ *Public School Educator Expense Credit* - for materials and supplies up to \$500

ESTIMATED TAXES PAID

- ☐ *Federal Quarterly Estimates Paid* - amount and date paid
- ☐ *State Quarterly Estimates Paid* - amount and date paid

Miscellaneous information: