1040 CHECKLIST

INCOME

_____ W-2's
_____ 1099's
_____ - interest
_____ - dividends
_____ - capital gains
_____ Alimony received
_____ Business income and expenses
_____ IRA distributions
_____ Pension and annuity distributions
_____ Rental income and expenses
_____ K-1's from partnership and S- Corp.
_____ Unemployment compensation
_____ Social Security benefits
_____ Other Income
_____ - gambling
_____ - lottery
_____ - prizes and awards
_____ Stock Sales
_____ - cost information
_____ - dates purchased and sold
_____ Home Sale/Purchase information
_____ - closing statement

DEDUCTIONS

_____ Medical expenses (if significant)
_____ Taxes paid
_____ - Real estate
_____ - State Income taxes
_____ - Property taxes (Car, etc)
_____ Home mortgage interest
_____ - Form 1098
_____ Points paid
_____ Investment interest
_____ Contributions
_____ - Cash
_____ - Property
_____ - Clothing
_____
_____
_____ Childcare expenses
_____ - ID No. of provider
_____ Alimony paid
_____ IRA, Roth, SEP & Keogh contrib.
_____ Tuition expenses (qualified)
_____ - Including books
_____ Student loan interest

MISCELLANEOUS

Estimated Tax Payments (April, June, September and January)
_____ - Federal - include dates paid, amount and check numbers
_____ - State
_____ Copies of last year tax returns if not prepared by us.
_____ Property tax bill for CT property tax credit
_____ Dependents social security numbers - **required** to receive deduction
_____ Recently changed names (ie. marriage/divorce) must be updated with Social Security Admin.
_____ Sales tax paid on motor vehicles and boats, if not claiming the income tax deduction
_____ Contributions to CHET 529 Plan (College Savings)

_____ **Education Credits –**
- Form 1098-T from each school if issued and complete address of each school
- Amount paid to each institution and any scholarships received.
- Books

_____ **Qualifying energy credit purchases**
- Windows and doors, Roof and insulation
- Wood and pellet stoves, HVAC and water heaters
- Geothermal heat pumps, solar panels, and fuel cells

_____ **Health Insurance Coverage Information**
Form 1095-A Health Insurance Marketplace Statement
- Required if health insurance was purchased on the exchange.

Visit us at www.stevenhintzcpa.com

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