

Tax Deduction Checklist

By John F. Smith

- ☐ General Income
 - ☐ Wages, salaries and tips.
 - ☐ Interest income statements.
 - ☐ Dividend income statements.
 - ☐ Sales of stock, land, etc.
 - ☐ Sales of real estate.
 - ☐ State tax refunds.
 - ☐ Alimony received or paid.
 - ☐ Unemployment compensation received.
 - ☐ Miscellaneous income.
 - ☐ Retirement income.
- ☐ Business Income
 - ☐ Business income and expenses.
 - ☐ Rental income and expenses.
 - ☐ Farm income and expenses.
 - ☐ Income from partnerships, trusts, and S-corporations.
 - ☐ Miles traveled for business purposes.
- ☐ Tax Credits
 - ☐ Child care provider address, ID number and amounts paid.
 - ☐ Adoption expense information.
 - ☐ Foreign taxes paid.
 - ☐ First time home buyer tax credit.
- ☐ Expense and Tax Deduction
 - ☐ Medical expenses for the family.
 - ☐ Medical insurance paid.
 - ☐ Prescription medicines and drugs.
 - ☐ Doctor and dentist payments.
 - ☐ Hospital and nurse payments.
 - ☐ Miles traveled for medical purposes.
 - ☐ Home mortgage interest.
 - ☐ Home second mortgage interest paid.

- ☐ Real estate taxes paid.
- ☐ State taxes paid with last years return (if itemized).
- ☐ Personal property taxes paid.
- ☐ Cash contributions to charities.
- ☐ Fair market value of non-cash contributions to charities.
- ☐ Unreimbursed expenses related to volunteer Work.
- ☐ Miles traveled for volunteer purposes.
- ☐ Casualty and theft losses.
- ☐ Amount paid to professional preparer last year.
- ☐ Unreimbursed expenses related to Your job.
- ☐ Union and professional dues.
- ☐ Investment expenses.
- ☐ Job-hunting expenses.
- ☐ IRA contributions.
- ☐ Student loan interest paid.
- ☐ Moving expenses.
- ☐ Last year's tax preparation fee.
- ☐ Tax Estimate Payments
 - ☐ Estimated payments made with ES vouchers.
 - ☐ Last years tax return overpayment applied to this year.
 - ☐ Off highway fuel taxes paid.
- ☐ General Information
 - ☐ Social security numbers for you and your spouse.
 - ☐ Educational expenses for you and your spouse.
 - ☐ Dependents names, years of birth, and social security numbers.
 - ☐ Dependents post high school educational expenses.
 - ☐ Child care expenses for each dependent.
 - ☐ Routing transmit number (RTN).
 - ☐ Bank account number (BAN).