Tax Deduction Checklist

Created: 12/26/2011

# Tasks:

☐ **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).**