

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).