

# 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).