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Checklist for Federal Income Tax Return

<u>Income:</u>	<u>Form</u>
<input type="checkbox"/> Wages from Employers	W-2
<input type="checkbox"/> Self Employed / Contractor	1099-NEC / 1099-MISC
<input type="checkbox"/> Interest Income	1099-INT
<input type="checkbox"/> Dividend Income	1099-DIV
<input type="checkbox"/> Stock Sales	1099-B
<input type="checkbox"/> Partnership and Royalty Income	Schedule K-1
<input type="checkbox"/> Retirement Distributions	1099-R
<input type="checkbox"/> Unemployment Compensation Benefits	1099-G
<input type="checkbox"/> Social Security Benefits	SSA-1099
<input type="checkbox"/> HSA Distributions	1099-SA
<input type="checkbox"/> Business Income / Expenses	
<input type="checkbox"/> Farm Income / Expenses	
<input type="checkbox"/> Rental Income / Expenses	
<input type="checkbox"/> Sale of Investments	
<input type="checkbox"/> Foreign Income Account Information	
<u>Deductions:</u>	<u>Form</u>
Retirement	
<input type="checkbox"/> Traditional IRA Contribution	5498
<input type="checkbox"/> Roth IRA Contribution	5498
Education	
<input type="checkbox"/> Student Loan Interest Paid	1098-E
<input type="checkbox"/> Educator's Expenses (Teachers)	
<input type="checkbox"/> College Tuition paid	1098-T
Itemized Deductions (Must total over Standard)	
<input type="checkbox"/> Medical Expenses Paid	
<input type="checkbox"/> Mortgage Interest Paid	1098
<input type="checkbox"/> Property Taxes Paid	1098
<input type="checkbox"/> Sales Tax Paid on Major Purchases	
<input type="checkbox"/> Contributions and Donations	
<u>Other Items</u>	
<input type="checkbox"/> Childcare expenses (under 14 years old)	
<input type="checkbox"/> Prepaid Federal Tax Deposits	
<input type="checkbox"/> Premium Tax Credit – Affordable Healthcare	Form 1095-A
General Information:	
<input type="checkbox"/> Taxpayer (and Spouse) Name, SS# and Date of Birth	
<input type="checkbox"/> Dependents – Names, SS#, Date of Birth, Relationship	
<input type="checkbox"/> Current Address	