

1040 CHECKLIST

INCOME

_____ W-2's _____
_____ 1099's _____
_____ - interest _____
_____ - dividends _____
_____ - capital gains _____
_____ Alimony received _____
_____ Business income and expenses _____
_____ IRA distributions _____
_____ Pension and annuity distributions _____
_____ Rental income and expenses _____
_____ K-1's from partnership and S- Corp. _____
_____ Unemployment compensation _____
_____ Social Security benefits _____
_____ Other Income _____
_____ - gambling _____
_____ - lottery _____
_____ - prizes and awards _____
_____ Stock Sales _____
_____ - cost information _____
_____ - dates purchased and sold _____
_____ Home Sale/Purchase information _____
_____ - closing statement _____

DEDUCTIONS

_____ Medical expenses (if significant)
_____ Taxes paid _____
_____ - Real estate _____
_____ - State Income taxes _____
_____ - Property taxes (Car, etc) _____
_____ Home mortgage interest _____
_____ - Form 1098 _____
_____ Points paid _____
_____ Investment interest _____
_____ Contributions _____
_____ - Cash _____
_____ - Property _____
_____ - Clothing _____
_____ Unreimb. employee business exp. _____
_____ Moving expenses (qualified) _____
_____ Childcare expenses _____
_____ - ID No. of provider _____
_____ Alimony paid _____
_____ IRA, Roth, SEP & Keogh contrib. _____
_____ Tuition expenses (qualified) _____
_____ - Including books _____
_____ Student loan interest _____

MISCELLANEOUS

_____ Estimated Tax Payments (April, June, September and January)
_____ - Federal - include dates paid, amount and check numbers
_____ - State _____
_____ Copies of last year tax returns if not prepared by us.
_____ Property tax bill for CT property tax credit
_____ Dependents social security numbers - **required** to receive deduction
_____ Recently changed names (ie. marriage/divorce) must be updated with Social Security Admin.
_____ Sales tax paid on motor vehicles and boats, if not claiming the income tax deduction
_____ Contributions to CHET 529 Plan (College Savings)
_____ **Education Credits –**
_____ - Form 1098-T from each school if issued and complete address of each school
_____ - Amount billed and amount paid from each institution and any scholarships received
_____ **Qualifying energy credit purchases**
_____ - Windows and doors, Roof and insulation
_____ - Wood and pellet stoves, HVAC and water heaters
_____ - Geothermal heat pumps, solar panels, and fuel cells
_____ **Health Insurance Coverage Information**
_____ Form 1095-A Health Insurance Marketplace Statement
_____ - Required if health insurance was purchased on the exchange.
_____ If not purchased on the exchange, will need coverage dates if not a full year.

Please see our website for additional information and checklists
Visit us at www.stevenhintzcpa.com