

## 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
_____	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 paid to each institution and any scholarships received.
- \_\_\_\_\_ - Books

#### **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.

**Please see our website for additional information and checklists**

**Visit us at [www.stevenhintzcpa.com](http://www.stevenhintzcpa.com)**