

TAX RETURN ORGANIZER AND CHECKLIST

INCOME ITEMS:

- Wage W-2 Forms From Every Employer.
- Gambling W-2G Forms.
- Retirement 1099-R Forms.
- Unemployment 109-9G Forms.
- Social Security 1099-SSA Forms.
- Dividend 1099-DIV Forms.
- Interest 1099-INT Forms.
- Investment/Stock Brokerage Statement.
- Sale of Residence Form.
- Cancellation of Debt 1099-C Form.
- Miscellaneous Income 1099-MISC Form.

DEDUCTIBLE ITEMS:

- Student Loan Interest Statements.
- Educator Expenses (Classroom Teachers).
- Traditional IRA Contributions.
- Health Savings Account (HSA).
- Health Insurance Premiums (post-tax only).
- Out of Pocket Medical/RX Expenses.
- Long Term Care Insurance Premiums.
- Medical Miles Driven.
- Home Mortgage Interest Form 1098.
- Real Estate/Property Taxes.
- Car License Fees.
- Monetary Donations to Charity.
- Non-Monetary Donations (Goodwill, etc).
- Charitable Miles Driven.
- Gambling Loss Statement.
- Unreimbursed Employee Expenses.
- Investment/Advisory Expenses.
- Iowa College Saving 529 Plan Contributions or Distributions.

INCOME TAXES PAID

- Federal & State Income Taxes Paid in Current Tax Year for Prior Years.
- List of ESTIMATED Tax Payments Made for Current Tax Year. MUST Include date paid and amount paid.

DEPENDENT / CHILDREN ITEMS:

- Childcare Expenses.
(including name, address & EIN or SS# of Childcare Provider).
- Kindergarden-12th grade Education Expenses.
- College Tuition 1098-T Forms.
(Check your college student's online college portal).
- Social Security 1099-SSA Forms.

IMPORTANT: IF your child worked and will be filing a tax return, be sure they DO NOT CLAIM THEMSELVES on their own tax return if you plan on claiming them.

SELF EMPLOYMENT / SMALL BIZ

- Miscellaneous Income 1099-MISC Forms.
- List of ALL INCOME sources.
- Categorized Summary of Expenses.
- Business Use of Home Worksheet.
- Business Mileage Log.
- List of Purchased Equipment/Vehicles.

IMPORTANT: Include Income Statement which summarizes ALL income and expenses into categories. DO NOT include all your receipts as we only need totals for each category. You keep the receipts for your records .

RENTAL PROPERTY

- List of Rental Income and Expenses for EACH Property Individually.
- Mortgage Interest & Property Tax Info.
- If sold during tax year, closing statement of sale and associated expenses.

IMPORTANT: Rent income and expenses MUST be separated on a PER PROPERTY basis.

FARM RENTAL / FARM OPERATION

- Rental / Farm Operation Income.
- Categorized Summary of Expenses.
- Livestock/Equipment Purchased or Sold.

PARTNERSHIP / S CORP / TRUST

- Schedule K-1.
- Unreimbursed Expenses.