



# Tax Checklist –

Please use this information to prepare for your appointment. Note items in **BLUE**

## Personal

- Last Years Tax Return
- Names, Birth dates, and SS #'s of Household Members
- Driver's License and SS Cards

- End of Year Pay Stub
- Proof Kids Live With You**

## Income

- Wages, W-2, 1099R
- Interest Income, 1099INT
- Dividend Income, 1099DIV
- Social Security, SSA-1099
- Pension, 1099R
- Business Income/Loss – See Below
- Stock & Mutual Fund Sales, 1099B
- Year End Investment Statements to Determine Cost Basis
- Yearend 401K / 403B to Determine NUA Eligibility

- Sale on Purchase of Home – HUD1
- Unemployment, 1099G**
- Gambling/Lottery Winnings, 1099G
- NJ Homestead Rebate + PTR (Senior Freeze)
- NJ Homestead Rebate + PTR (Senior Freeze)
- Miscellaneous Income, 1099MISC
- Rental Income – See Below
- Partnership, S Corp & Trust Income
- Stimulus Payment Received**

## Deductions

- Alimony Paid - Need SS# of Ex-Spouse
- Student Loan Interest, 1098E
- Penalty on Early Withdrawal from Savings

- IRA Contributions
- Tuition & Fees Paid, 1098T
- Charity for Non-Itemizers**

## Itemized Deductions

- State Tax Refund
- Medical, Dental, Eyecare
- Investment Expenses
- Long Term Care Premium
- Real Estate Taxes Paid

- Gambling/Lottery Losses
- State & Local Taxes Paid
- Mortgage Interest, 1098
- Investment Interest Paid
- Charitable Contributions

## Credits

- Childcare Credits – Need EIN or SS# of Provider along with Address
- Education Credits, 1098T

- Earned Income Credit
- Retirement Savings Contributions

## Self Employed, Business Owners & Rental Property Owners

- Call to Review Your Individual Situation for Additional Information Needed

## Other

- Life Insurance Policy
- Long Term Care Policy

- Changes in Personal Information