

Peter Deng Tax Return Preparation Checklist

Please print the tax to-do List below look it over and bring with you any of these documents that you have.

General Taxable Income

- ___ W-2 Form(s) for Wages, Salaries, and Tips
- ___ Interest Income Statements: Form 1099-INT & 1099-OID
- ___ Dividend Income Statements: Form 1099-DIV
- ___ Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
- ___ Sales of Real Estate: Form 1099-S
- ___ State Tax Refunds: Form 1099-G
- ___ Alimony Received or Paid
- ___ Unemployment Compensation Received
- ___ Miscellaneous Income: Form 1099-MISC

Retirement Income

- ___ Retirement Income: Form 1099-R
- ___ Social Security Income and Railroad Retirement Income: Form SSA-1099

Business Income

- ___ Business Income and Expenses
- ___ Rental Income and Expenses
- ___ Farm Income and Expenses
- ___ Form K-1 Income from Partnerships, Trusts, and S-Corporations
- ___ Tax Deductible Miles Traveled for Business Purposes

Tax Credits Checklist

- ___ Child Care Provider Address, I.D. Number and Amounts Paid
- ___ Adoption Expense Information
- ___ Foreign Taxes paid
- ___ First Time Home Buyer Tax Credit

Expense and Tax Deduction Checklist

- ___ Medical Expenses for the Family
- ___ Medical Insurance Paid

- ___ Prescription Medicines and Drugs
- ___ Doctor and Dentist Payments
- ___ Hospital and Nurse Payments
- ___ Tax Deductible Miles Traveled for Medical Purposes
- ___ Home Mortgage Interest from Form 1098
- ___ Home Second Mortgage Interest Paid
- ___ Real Estate Taxes Paid
- ___ State Taxes Paid with Last Year's Return (if claiming itemized deductions)
- ___ Personal Property Taxes Paid
- ___ Charitable Cash Contributions
- ___ Fair Market Value of Non-cash Contributions to Charities
- ___ Unreimbursed Expenses Related to Volunteer Work
- ___ Tax Deductible Mileage for Volunteer Purposes
- ___ Casualty and Theft Losses
- ___ Amount Paid to Professional Preparer Last Year
- ___ Unreimbursed Expenses Related to Your Job
- ___ Miles Traveled Related to Your Job
- ___ Union and Professional Dues
- ___ Investment Expenses
- ___ Job-hunting Expenses
- ___ IRA Contributions
- ___ Student Loan Interest Paid
- ___ Moving Expenses
- ___ Last Year's Tax Preparation Fee

Tax Estimate Payments Checklist

- ___ Estimated Tax Payments Made with ES Vouchers
- ___ Last Year's Tax Return Overpayment Applied to This Year
- ___ Off Highway Fuel Taxes Paid

General Information

- ___ Copy of Last Year's Tax Return
- ___ Social Security Numbers for You and Your Spouse
- ___ Educational Expenses for You and Your Spouse
- ___ Dependents' Names, Years of Birth, and Social Security Numbers

- ____ Dependents' Post High School Educational Expenses
- ____ Child Care Expenses for Each Dependent
- ____ Routing Transmit Number (RTN) (For direct deposit/debit purposes)
- ____ Bank Account Number (BAN) (For direct deposit/debit purposes)