

Mel Burrow CPA, LLC.

741 Piedmont Avenue NE, Suite 700

Atlanta, GA 30308-1460

Phone: (404) 875-5626 | Fax: (404) 875-1344 | E-mail: bk@melburrowlaw.com

Personal Tax Checklist

This is only an overview. Not all items may be applicable to you.

Taxable Income Forms, Documents

- 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: Form 1099-G
- Nonemployment Compensation: Form 1099-NEC
- Miscellaneous Income: Form 1099-MISC
- Retirement Income: Form 1099-R
- Social Security Income and Railroad Retirement Income: Form SSA-1099
- 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

- Child Tax Credit
- Child Care Provider Address, I.D. Number and Amounts Paid for the Child and Dependent Care Credit
- Earned Income Tax Credit (EITC)
- Adoption Expense Information for the Adoption Tax Credit
- Foreign Taxes paid
- First Time Home Buyer Tax Credit

Tax Deductions, Expenses

- Medical Expenses for the Family
- Medical Insurance Paid
- Self-employed Business Expenses
- Prescription Medicines and Drugs
- Doctor and Dentist Payments
- Hospital and Nurse Payments

Tax Deductions, Expenses (cont.)

- ___ 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
- ___ HSA, FSA Contributions
- ___ Student Loan Interest Paid from Form 1098
- ___ Moving Expenses
- ___ Last Year's Tax Return Preparation Fee

Tax Estimate Payments

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

General Information & Other Documents

- ___ Social Security Numbers for You and Your Spouse
- ___ Dependents' Names, Years of Birth, and Social Security Numbers
- ___ Child Care Expenses for Each Dependent
- ___ Dependents' Post High School Educational Expenses
- ___ Educational Expenses for You and Your Spouse
- ___ 1095-A – Health Insurance From HealthcareMarketplace Form
- ___ Routing Transmit Number (RTN) (For direct deposit/debit purposes)
- ___ Bank Account Number (BAN) (For direct deposit/debit purposes)
-