Strategic Tax Planners LLC
CERTIFIED FINANCIAL PLANNERS AND TAX CONSULTANTS

*** Tax Preparation Checklist

Checklist of Information Needed to Complete Your Tax Return

If any item listed applies to you, check the box and attach the information

Income Information

- ☐ Wages (Form W-2)
- ☐ Interest Income (Form 1099-INT)
- ☐ Foreign bank accounts, income +/or paid taxes
- ☐ Dividend Income (Form 1099-DIV)
- ☐ Pension Distributions (Form 1099-R)
- ☐ Social Security Benefits (Form 1099-SSA)
- ☐ State / Local Refunds (Form 1099-G)
- ☐ Gambling Income (Form W-2G)
- ☐ Stock Sale Information/Capital Gains (Form 1099-B)
  - ☐ Each stock sale: Date purchased, number of shares bought, amount paid
- ☐ Other Income
  - ☐ Alimony Received
  - ☐ Unemployment Compensation (Form 1099-G)
  - ☐ Debt Cancellation (Form 1099-C)
  - ☐ Disability Income
  - ☐ Jury Duty
  - ☐ Tip Income
  - ☐ Scholarships (Form 1098-T)
  - ☐ Education Savings Account Withdrawal (Form 1099-Q)
  - ☐ Bartering Income (Form 1099-B)
  - ☐ Achieving Better Life Experience Distrib. (Form 1099-QA)
- ☐ Small Business (self-employed or independent contractor business owner)
  - ☐ Business Income (Form 1099-MISC plus items not on 1099-MISC)
  - ☐ Business Expenses (Provide list or use the ***Business Organizer***)
  - ☐ Vehicle Information
- ☐ Rental Property
  - ☐ Rental Income (Form 1099-MISC)
  - ☐ Related Expenses (Provide list or use the ***Rental Property Organizer***)
- ☐ Schedules K-1 from Partnerships, S Corps, Trusts
- ☐ Sale of Real Estate not qualifying for Personal Residence Exemption
  - ☐ Closing Statement – Sale of Property
  - ☐ Closing Statement – Purchase of Property
  - ☐ List of additions/improvements while you owned the property
  - ☐ Forgiveness of Debt income (Form 1099-C or 1099-A)

Deduction Information:

- ☐ IRA Contributions
- ☐ SEP, Simple, Keogh Plans
- ☐ Student Loan Interest (Form 1098-E)
- ☐ Student Expenses (Forms 1098-T & 1099-Q)
- ☐ Alimony Paid
  - ☐ Recipient Name and SS #
- ☐ Mortgage Interest (Form 1098)
- ☐ Investment Interest
- ☐ Cash and Noncash Charitable Contributions
- ☐ Business or Disaster Casualty/Theft Loss
- ☐ Medical Expenses
  - ☐ Health Insurance
  - ☐ Out of Pocket Medical Expenses (& Form 1099-SA)
  - ☐ Forms 1095-A, 1095-B & 1095-C
  - ☐ Healthcare Market Place Exemption
  - ☐ Medical Account Contribution (Form 5498-SA)
  - ☐ ABLE Account Contribution (Form 5498-QA)
- ☐ Real Estate Taxes
- ☐ Other Taxes (including sales tax paid on the purchase of autos, boats and RVs for personal use)

Credit and Payment Information:

- ☐ Child Care Expenses
  - ☐ Provide name, address, SS# or EIN, and amount paid for each child
- ☐ Estimated tax payments (dates and amounts paid)
- ☐ Legal papers for adoption, divorce or separation involving custody of your dependant children
- ☐ Tuition Statements (Form 1098-T) & Education Expenses
- ☐ Copy of voided check (for direct deposit of refund information)
- ☐ Energy or electric vehicle tax credit information
- ☐ Closing statement for first-time or long-time homebuyers' credit