

SJS Income Tax Preparation Checklist

The purpose of this form is to make sure that you have provided all the documents needed to prepare your taxes. If you do not report all income to the IRS, it may cause you problems in the near future.

- _____ W2's from all jobs (VERY IMPORTANT- MUST FILE ALL W2's)
- _____ Picture ID and Social Security cards, Date of Birth for you & all dependents
- _____ 1099 MISC Miscellaneous Income/Records of all Expenses, Business-use assets
Office in Home
- _____ Vehicle Information – Total Miles Driven for the year (beginning/ending odometer readings) Parking
and Tolls Paid, Actual Expenses Paid
- _____ W2G Lottery/Gambling Winnings
- _____ Other Income Alimony received, Health care reimbursements, Jury Duty, Hobby, Prizes
- _____ 1099-G Certain Government Payments
Unemployment compensation/State Refunds
- _____ 1098 Mortgage Interest
- _____ 1098 E/ 1098 T Tuition Statement
- _____ 1099 DIV Dividend Income
- _____ 1099 R Retirement Income (Distributions from Pensions, Annuities)
- _____ 1099 INT Interest Income (interest received from banks)
- _____ 1099 B Income from sales of stock or other property
- _____ 1099 A Acquisition/Abandonment Income
- _____ 1099 C Cancellation of Debt
- _____ 1099 RRB Rail Road Retirement Income
- _____ 1099 SSA Social Security Income
- _____ 5405 First Time Home Buyer Letter from IRS to Repay \$500.00
- _____ Receipts for Itemizing Deductions (please check)

Form 1098 Mortgage Interest	HUD Statement
State/Local Income Tax Paid	Cash amounts donated
Real Estate and Property Taxes Paid	Non-Cash donations
Vehicle Sales Tax	Charitable Miles
Amounts paid for healthcare ins., doctors, etc.	Medical Miles
Investments Expenses	Tax Preparation fees
Job hunting expenses	Employment Related expenses
- _____ Child Care Records – need provider's ID number, address and phone number

I/WE _____ certify that I/we have provided all my tax documents. If I/We have to amend my/our return, there will be a \$50.00 charge.