

2018 Tax Return Checklist

The checklist represents common types of income and expenses identified by the common IRS Form number. If a particular item applies to you, simply check the box and attach the supporting documentation.

Income	Other Income
<input type="checkbox"/> W-2 (Wages) <input type="checkbox"/> 1099-INT (Interest income) <input type="checkbox"/> 1099-DIV (Dividend income) <input type="checkbox"/> Foreign bank accounts, income +/- paid taxes <input type="checkbox"/> 1099-B (Stock sale/capital gains) <input type="checkbox"/> Number of shares, date, & amount paid <input type="checkbox"/> 1099-R (Pension distributions) <input type="checkbox"/> State/local refunds <input type="checkbox"/> Form W-2G (Gambling income) <input type="checkbox"/> Schedule K-1 from Partnership, S Corp or Trust	<input type="checkbox"/> Alimony received <input type="checkbox"/> 1099-G (Unemployment, state tax refund) <input type="checkbox"/> 1099-SSA (Social Security benefits) <input type="checkbox"/> Disability income <input type="checkbox"/> 1099-MISC (Jury duty) <input type="checkbox"/> Tip income <input type="checkbox"/> 1098-T (Scholarships) <input type="checkbox"/> 1099-Q (Education savings account withdrawal) <input type="checkbox"/> 1099-B (Bartending income) <input type="checkbox"/> 1099-MISC/CCC1099-G/1099-PATR (Farm income)
Small Business	Rental Property
<i>Self-employed or independent contractor business owner</i> <input type="checkbox"/> 1099-MISC (Business income) <input type="checkbox"/> Income not reported on Form 1099-MISC <input type="checkbox"/> Itemized business expenses— Business Organizer <input type="checkbox"/> Vehicle information	<input type="checkbox"/> 1099-MISC (Rental income) <input type="checkbox"/> Income not reported on Form 1099—MISC <input type="checkbox"/> Related Expenses— Rental Property Organizer
Real Estate	Tax Payments
<input type="checkbox"/> Closing statement – sale of property <input type="checkbox"/> Closing statement – purchase of property <input type="checkbox"/> Itemized additions/improvements <input type="checkbox"/> 1099-C or 1099-A (Forgiveness of debt income) <input type="checkbox"/> 1098 (Mortgage interest)	<input type="checkbox"/> Estimated tax payments (Dates and amount) <input type="checkbox"/> Real estate taxes <input type="checkbox"/> Other taxes – sales tax paid for auto, boat and RV purchases
Deductions/Adjustments	Other Expenses
<input type="checkbox"/> ROTH IRA contributions <input type="checkbox"/> 5498 - SEP, SIMPLE IRA, Keogh Plans <input type="checkbox"/> Form 1098-E (Student loan interest) <input type="checkbox"/> 1098-T (Tuition statements) <input type="checkbox"/> 1099-INT (Penalty or early withdrawal of savings) <input type="checkbox"/> Alimony paid (Provide recipient name and SS#) <input type="checkbox"/> Moving expenses (Armed forces only) <input type="checkbox"/> Margin interest as reported by brokerage firm <input type="checkbox"/> Cash and non-cash charitable contributions <input type="checkbox"/> Casualty/theft loss	<input type="checkbox"/> Educator expenses (K-12 only) <input type="checkbox"/> 5498-SA (health savings account contributions) <input type="checkbox"/> Energy or vehicle tax credit information <input type="checkbox"/> Business expenses of reservists, performing artists, and fee-based government officials and partners and S Corp shareholders <input type="checkbox"/> State/local income taxes (amount & date paid) * <input type="checkbox"/> 1098 (real estate taxes, home mortgage interest, mortgage insurance premiums) * <input type="checkbox"/> Personal property, ad valorem, and other taxes *
Children	Medical Expenses
<input type="checkbox"/> Child Care expenses <input type="checkbox"/> Name, address, SS#, and amount <input type="checkbox"/> Legal papers for adoption, divorce or separation that involves custody of dependent children	<input type="checkbox"/> Proof of health insurance coverage for 2018 <input type="checkbox"/> 1095-A <input type="checkbox"/> Out-of-pocket medical expenses <input type="checkbox"/> Healthcare Marketplace exemption <input type="checkbox"/> Self-employment health insurance

* combined personal state and local income taxes, real estate taxes, and other taxes are limited to \$10,000