

## 2015 TAX PREPARATION CHECKLIST

### INCOME SOURCES

- Wages (W-2s)*
- Interest, Dividends, Capital Gain Distributions (1099s)*
- Sales of Stock or other property including Cost Basis (1099s & Broker Statements)*
- Rents and Royalties (may receive 1099)*
- Alimony (need SS# of payer)*
- Pensions, Annuities and other Retirement Accounts (1099)*
- Unemployment Compensation (1099)*
- Social Security and Railroad Retirement Benefits (1009-S or 1099-R)*
- Business and Farm Income (may have 1099-MISC and/or CCC 1099-G)*
- Partnership, S Corporation Trust and Estate Income (K-1)*
- Gambling and Lottery Winnings (1099-G or W-2G)*
- State and Local Income Tax Refunds*
- Scholarships and Fellowships (1099)*
- Other Miscellaneous Income, i.e., Personal Auto Use*
- Cancellation of Debt (1099-A or 1099-C)*
- Healthcare info (1095-A, B or C) **Warning-no duplicates will be issued***

### POSSIBLE EXPENSES TO REDUCE TAXES

- Health Care Insurance and Expenses, Including Long Term Care Premiums*
- New Dependants (need date of birth and SS#'s);*
- Adoption costs*
- Home Mortgage Interest, Equity Loan Interest, Private Mortgage Insurance*
- Investment Interest and Expenses*
- Charitable Contributions (cash and non-cash property)*
- Out-of-Pocket Expenses and Mileage for Volunteer Services*
- Union and Professional Dues*
- Child and Disabled-Dependent Care Expenses*
- Job-seeking Expenses*
- Traditional or Roth IRA, Keogh, SEP and SIMPLE Contributions*
- Expenses for Business Use of Automobiles/Trucks*
- Unreimbursed Business Expenses*
- Alimony Paid (need recipient's SS #)*
- Work-related Moving Expenses*
- Real Estate Taxes*
- Casualty and Theft Losses*
- Education and/or Vocational Expenses*
- Estimated Tax Payments Made*
- Educator Expenses*
- Gambling Losses*
- Home Energy Improvements*

*Questions you have for 2015:*

*Events that may occur in 2016:*

