

## Checklist

Name:

SSN:

### Checklist

#### Untitled Version (1/6/2023 12:03:00 PM)

This check list is provided to help you gather necessary information for us to prepare your 2022 income tax return. Return this list, along with the supporting documentation, to our office and let us know of any significant changes from your 2021 tax year.

#### Income

- Wages (Form W-2)
- IRA distributions, pensions, and annuities (Form 1099-R)
- Dividends (Form 1099-DIV)
- Interest (Form 1099-INT)
- Miscellaneous income (Form 1099-MISC)
- Nonemployee compensation (Form 1099-NEC)
- Social Security benefits (Form SSA-1099)
- Partnerships, S Corporations, Estates and Trusts (Schedule K-1)
- Brokerage transactions and disposition of capital assets (Form 1099-B)
- Self-employed income and expenses (Schedule C)
- Rent and royalty income and expenses (Schedule E)
- Gambling income (Form W2-G)
- Sale of assets or property
- Cancellation of debt
- Other income \_\_\_\_\_

#### Payments (provide supporting documentation for payments made for the following items)

- Educator classroom expenses
- Employee business expenses
- Contributions to a Health Savings Account
- Expenses related to work relocation with the military
- Alimony
- Student loan interest
- Refunded student loan interest payments
- Student loan forgiveness
- Tuition and fees for higher education
- Expenses related to child or dependent care
- Contributions to a Retirement Savings Account
- Medical and dental expenses
- Real estate taxes
- Other state and local taxes
- Mortgage interest
- Investment interest
- Cash contributions
- Noncash contributions
- Unreimbursed employee expenses
- Investment expenses
- Gambling losses
- Other payments \_\_\_\_\_