



Client Name:

Date:

Year in Review:

YES NO

		W-2 wages	W-2
		Interest income	1099-INT
		Dividends	1099-DIV
		Capital gains/losses	1099-B
		Refund of prior year state income tax	1099-G
		Alimony received	
		Business income/loss	Schedule C
		IRA/pension/annuity distributions	1099-R
		Rental real estate	
		Business income/loss	K-1's
		Farm income	
		Unemployment compensation	1099-G
		Social security benefits	SSA
		Gambling income	1099-G
		Cancellation of debt income	1099-C or Misc
		Educator expenses	
		Health savings account	
		Moving expenses	
		IRA/retirement plan contributions/ROTH conversion	
		Health insurance premiums	
		Alimony paid	
		Student loan interest	1098-E
		Tuition and fees	
		Itemized Deductions	
		* Medical/dental/vision expenses	
		* Taxes paid – state income, real estate, new vehicle	
		* Home mortgage interest/points/mortgage ins prem	1098
		* Personal property taxes	
		* Charitable Contributions	
		- Cash contributions	
		- Non-cash contributions	1098-C
		* Unreimbursed employee expenses	
		* Casualty/theft loss	
		* Tax preparation fees	
		* Gambling winnings/loss	
		* Other expenses	
		Estimated tax payments	
		Child and dependent care credit	
		Education credits	
		Residential energy credits	

