

Tax Advisory Group

OF JACKSONVILLE, INC.

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Personal Tax Checklist

INCOME

W-2 – All Employers
 1099
Interest from Banks
Investment Dividends
Stock Sales/Losses
Pensions/Annuities
Prizes/Bonuses
Social Security
Retirement Withdrawals

K-1
Activity Reporting for
Business Investments

Rental Property
Income/Expenses

Alimony Received

Business Income/Expenses

DEDUCTIONS

Medical Expenses
(Out-of-Pocket)
Insurance Premiums
Prescriptions
Dentist/Doctors
Eyeglasses/Contacts
Nursing Home/Rehab
Misc.

Taxes
Real Estate Taxes
State/Personal
Sales Tax/Large Purchases

Interest Paid
Mortgage
2nd Mortgage (Home)
Lines of Credit
Home Equity Loans
Student Loans
Investment Interest

Charitable Contributions
Place of Worship
Charitable Organizations

Educational Expenses
1098-T
Books/Supplies

Energy Efficient
Improvements-
Renewable Sources
(Solar/Wind/ Geothermal /Fuel
Cells)

MISCELLANEOUS

Real Estate Transactions
Closing Statements/Refinance

Contributions to Retirement
Accounts

Moving Expenses (Military)
 Alimony Paid
 Loss from Theft, Fire or
Vandalism, Storm damage

Crypto Currency
Transactions i.e. Bitcoin

Childcare Expense
(Include EIN, Name of facility &
amount paid)
i.e. Daycare, Afterschool
Program

1095-A Healthcare Forms

Handling Your Tax Needs from Start to Finish