

Tax Advisory Group

OF JACKSONVILLE, INC.

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Personal Tax Checklist

INCOME

- W-2's – All Employees**
 - 1099's**
 - Interest from Banks
 - Investment Dividends
 - Stock Sales/Losses
 - Pensions/Annuities
 - Prizes/Bonuses
 - Social Security
 - Retirement Withdrawals
 - K-1's**
 - Activity Reporting for
 - Business Investments
 - Rental Property**
 - Income/Expenses
 - Alimony Received**
 - Business Income/Expenses**
 - Request Business Wkst/See
- link at www.taxadvantage.org

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
- Any transactions related to crypto currency. i.e. Bitcoin etc
- Childcare that is with a registered business, incl EIN, Name of facility & amount paid. i.e. Daycare, Afterschool Program
- 1095-A Healthcare Forms**

*****Must exceed 10% of adjusted gross income.
Tip - Use your gross income, if it is close to 10% include the medical out-of-pocket expense.**

Handling Your Tax Needs from Start to Finish