

Tax Deduction Checklist, Tax Preparation Checklist
Peggy's Tax Service
972-285-1030

General Income

- W-2 forms(s) for Wages, Salaries and Tips
- Interest Income Statements: Form 1099-INT & 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Sales of Stock, Land, etc.: Form 1099-B
- State Tax Refunds: 1099-G
- Alimony Received or Paid
- Unemployment Compensation Received
- Miscellaneous Income: Form 1099-MISC

Retirement Income

- Retirement Income: Form 1099-R
- Social Security and Railroad Retirement Income
- Form SSA-1099

Business Income

- Business Income and Expenses
- Rental Income and Expenses
- Farm Income and Expenses
- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Miles Traveled for Business Purposes
- If this is your first year to see our firm, please bring a copy of last year's return

Tax Credits Checklist

- Child Care Provider Address, I.D. Number and Amounts Paid
- Adoption Expense Information
- Foreign Taxes Paid
- First Time Home Buyer Tax Credit

Expense and Tax Deduction Checklist

- Medical Expenses for the Family
- Medical Insurance Paid
- Prescriptions Medicines and Drugs
- Doctor and Dentist Payments

- Hospital and Nurse Payments
- Miles Traveled for Medical Purposes
- Home Mortgage Interest from Form 1098
- Home Second Mortgage Interest Paid
- Real Estate Taxes Paid
- Personal Property Taxes Paid
- Cash Contributions to Charities
- Fair Market Value of Non-cash Contributions to Charities
- Unreimbursed Expenses Related to Volunteer Work
- Union and Professional Dues
- Investment Expenses
- Job-hunting Expenses
- IRA Contributions
- Student Loan Interest Paid
- Moving Expenses
- Last year's Tax Preparation Fee

Tax Estimate Payments Checklist

- Estimated Payments Made with ES Vouchers
- Last Years Tax Return Overpayment Applied to This Year
- Off Highway Fuel Taxes Paid

General Information

- Social Security Numbers for you and Your Spouse
- Educational Expenses for You and Your Spouse
- Dependents Names, Years of Birth, and Social Security Numbers
- Dependents Post High School Educational Expenses
- Child Care Expenses for Each Dependent
- Routing Transmit Number (RTN)(For direct deposit/debit purposes)
- Bank Account Number (BAN)(For direct deposit/debit purposes)