

# 1040 CHECKLIST

## INCOME

\_\_\_\_ W-2's  
\_\_\_\_ 1099's  
\_\_\_\_ - interest  
\_\_\_\_ - dividends  
\_\_\_\_ - capital gains  
\_\_\_\_ Alimony received  
\_\_\_\_ Business income and expenses  
\_\_\_\_ IRA distributions  
\_\_\_\_ Pension and annuity distributions  
\_\_\_\_ Rental income and expenses  
\_\_\_\_ K-1's from partnership and S- Corp.  
\_\_\_\_ Unemployment compensation  
\_\_\_\_ Social Security benefits  
\_\_\_\_ Other Income  
\_\_\_\_ - gambling  
\_\_\_\_ - lottery  
\_\_\_\_ - prizes and awards  
\_\_\_\_ Stock Sales  
\_\_\_\_ - cost information  
\_\_\_\_ - dates purchased and sold  
\_\_\_\_ Home Sale/Purchase information  
\_\_\_\_ - closing statement

## DEDUCTIONS

\_\_\_\_ Medical expenses (if significant)  
\_\_\_\_ Taxes paid  
\_\_\_\_ - Real estate  
\_\_\_\_ - State Income taxes  
\_\_\_\_ - Property taxes (Car, etc.)  
\_\_\_\_ Home mortgage interest  
\_\_\_\_ - Form 1098  
\_\_\_\_ Points paid  
\_\_\_\_ Investment interest  
\_\_\_\_ Contributions  
\_\_\_\_ - Cash  
\_\_\_\_ - Property  
\_\_\_\_ - Clothing  
\_\_\_\_ Unreimb. employee business exp.  
\_\_\_\_ Moving expenses (qualified)  
\_\_\_\_ Childcare expenses  
\_\_\_\_ - ID No. of provider  
\_\_\_\_ Alimony paid  
\_\_\_\_ IRA, Roth, SEP & Keogh contrib.  
\_\_\_\_ Tuition expenses (qualified)  
\_\_\_\_ - Including books  
\_\_\_\_ Student loan interest

## MISCELLANEOUS

\_\_\_\_ Estimated Tax Payments (April, June, September and January)  
\_\_\_\_ - Federal - include dates paid, amount and check numbers  
\_\_\_\_ - State  
\_\_\_\_ Copies of last year tax returns if not prepared by us.  
\_\_\_\_ Property tax bill for CT property tax credit  
\_\_\_\_ Dependents social security numbers - **required** to receive deduction  
\_\_\_\_ Recently changed names (ie. marriage/divorce) must be updated with Social Security Admin.  
\_\_\_\_ Sales tax paid on motor vehicles and boats, if not claiming the income tax deduction  
\_\_\_\_ Contributions to CHET 529 Plan (College Savings)

### New Credits - See our summary of credits for additional information

\_\_\_\_ Sales tax on purchase of new vehicle purchased 2/17/09 to 12/31/09  
\_\_\_\_ Closing statement for qualifying first time home buyer credit \$8,000 and \$6,500 for qualifying existing homeowners  
\_\_\_\_ Qualifying energy credit purchases - need Manufacturer Certification Statement  
\_\_\_\_ - Windows and doors  
\_\_\_\_ - Roof and insulation  
\_\_\_\_ - Wood and pellet stoves  
\_\_\_\_ - HVAC and water heaters  
\_\_\_\_ - Geothermal heat pumps, solar panels, and fuel cells

**Please see our website for additional information and checklists**

Visit us at [www.stevenhintzcpa.com](http://www.stevenhintzcpa.com)