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)

- 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

Steven E. Hintz, CPA ***1330 Sullivan Avenue South Windsor, CT 06074*** ***(860) 644 - 9453***