



8 Commerce Way, Suite #3  
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Email [Info@SeacoastAccountability.com](mailto:Info@SeacoastAccountability.com)

## Individual Tax Checklist

### ***Income Items:***

- Wages (W2)
- Interest Income (1099 INT)
- Dividend Income (1099 DIV)
- Sales of stocks or bonds (1099B)
- Unemployment Compensation (1099G)
- State Tax Refunds (1099G)
- Rental Income
- Distributions from retirement accounts (1099R)
- Alimony Received
- Social Security Received (SSA 1099)

### ***Other Deductions and Adjustments:***

- Contributions to IRAs, or money withdrawn (Form 5498, 1099R)
- Student Loan Interest Paid (1098E)
- Tuition expenses paid (1098T)
- Educator expenses, if you are a teacher (classroom supplies)
- Moving expenses
- Health savings account distributions (1099 SA)
- Alimony Paid
- Home Energy Improvements (Energy Star rated insulations, windows, doors, roofs, furnace)



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### ***Itemized Deductions:***

#### Medical:

- Health and dental insurance premiums
- Co-Payments
- Deductibles
- Dental expenses out of pocket
- Prescription costs out of pocket
- Mileage for medical purposes

#### Taxes:

- Real estate taxes paid (main home, vacant lots, second home, etc.)
- Auto registrations (amount paid to city/town, not state, indicate if new car purchased and date of delivery)
- Any sales tax paid in another state
- Resident tax paid

#### Mortgage Info:

- Mortgage Interest (main home, vacant lots, second home, etc.)
- Points paid for refinancing
- Mortgage Insurance Premiums paid

#### Charitable Contributions (with receipts, cancelled checks, etc.)

- Cash (name of organization, date, amount, receipt if over \$500)
- Noncash (with receipt listing items donated, i.e., 10 pairs of pants, etc., date, and address)
- Miles driven for charitable purposes

#### Casualty Losses (theft, flood, fire)

- Cost of damages
- Insurance reimbursements
- Out of pocket costs

#### Miscellaneous Deductions:

- Employee deductions (vehicle mileage, office expenses, travel, meals, home office, union dues, business specific clothing, see above under business for further details)
- Tax preparation fees
- Safe deposit box
- Investment expenses
- Gambling losses (scratch tickets, bingo, etc. up to amount of earnings)



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## Individual Tax Checklist

### ***Credits:***

- Day Care ( receipt from provider with amount per child, name, address and EIN)
- Education Credit (Form 1098-T, full or part-time, year (freshman, etc.), prior credit taken)
- Residential Energy Credit Energy Star rated insulations, windows, doors, roofs, furnace)
- First Time Homebuyer Credit (tax year filed for credit)