KYLE C. JACKSON, CPA, PC
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Tax Preparation Checklist

Checklist of Information Needed to Complete Your Tax Return

If any item listed applies to you, check the box and attach the information

Income Information

☐ Wages (Form W-2)
☐ Interest Income (Form 1099-INT)
☐ Foreign bank accounts, income +/or paid taxes
☐ Dividend Income (Form 1099-DIV)
☐ Stock Sale Information/Capital Gains (Form 1099-B)
- ☐ Each stock sale: Date purchased, number of shares bought, amount paid

☐ Other Income
- ☐ Alimony Received
- ☐ Unemployment Compensation (Form 1099-G)
- ☐ Social Security Benefits (Form 1099-SSA)
- ☐ Disability Income
- ☐ Jury Duty
- ☐ Tip Income
- ☐ Scholarships (Form 1098-T)
- ☐ Education Savings Account Withdrawal (Form 1099-Q)
- ☐ Bartering Income (Form 1099-B)

☐ Small Business (self-employed or independent contractor business owner)
- ☐ Business Income (Form 1099-MISC plus items not on 1099-MISC)
- ☐ Business Expenses (Provide list or use the ***Business Organizer***)
- ☐ Vehicle Information

☐ Rental Property
- ☐ Rental Income (Form 1099-MISC)
- ☐ Related Expenses (Provide list or use the ***Rental Property Organizer***)

☐ Schedules K-1 from Partnerships, S Corps, Trusts
☐ Sale of Real Estate not qualifying for Personal Residence Exemption
- ☐ Closing Statement – Sale of Property
- ☐ Closing Statement – Purchase of Property
- ☐ List of additions/improvements while you owned the property
- ☐ Forgiveness of Debt income (Form 1099-C or 1099-A)

☐ Stock Sale Information/Capital Gains (Form 1099-B)
☐ Pension Distributions (Form 1099-R)
☐ State / Local Refunds
☐ Gambling Income (Form W-2G)

Deduction Information:

☐ IRA Contributions
☐ SEP, Simple, Keogh Plans
☐ Student Loan Interest (Form 1098-E)
☐ Alimony Paid
- ☐ Recipient Name and SS #

☐ Moving Expense
☐ Mortgage Interest (Form 1098
☐ Investment Interest
☐ Cash and Noncash Charitable Contributions
☐ Casualty/Theft Loss
☐ Medical Expenses
- ☐ Health Insurance
- ☐ Out of Pocket Medical Expenses
- ☐ Form 1095-A
- ☐ Healthcare Market Place Exemption

☐ Real Estate Taxes
☐ Other Taxes (including sales tax paid on the purchase of autos, boats and RVs for personal use)
☐ Employee Business Expense (Provide list or use the ***Business Organizer***)

Credit and Payment Information:

☐ Child Care Expenses
- ☐ Provide name, address, SS# or EIN, and amount paid for each child

☐ Estimated tax payments (dates and amounts paid)
☐ Legal papers for adoption, divorce or separation involving custody of your dependant children
☐ Tuition Statements (Form 1098-T) & Education Expenses
☐ Copy of voided check (for direct deposit of refund information)
☐ Energy or vehicle tax credit information
☐ Closing statement for first-time or long-time homebuyers' credit

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Individual Income Tax Organizer
Special Deductions & Tax Credits

Special Deductions (complete items only if applicable)

Retirement Contributions — ***Husband*** / ***Wife***

IRA Deduction ($5,500 maximum, or $6,500 if age 50 or more) ... Husband $ ______ ... Wife $ ______

Self-employed SEP, SIMPLE or qualified plans ... Husband $ ______ ... Wife $ ______

Or, calculate maximum amount ... ☐ ... ☐

Health Savings Account (Form 5498-SA) ... Husband $ ______ ... Wife $ ______

Student Loan Interest (Form 1098-E) ... Husband $ ______ ... Wife $ ______

Teacher/Educator Classroom Expenses ($250 maximum) ... Husband $ ______ ... Wife $ ______

Qualified Higher Education Tuition & Fees ... Husband $ ______ ... Wife $ ______

Dependents Qualified Tuition & Fees (name & amount): — ***Dependent***

______ ... $ ______
______ ... $ ______
______ ... $ ______
______ ... $ ______

Alimony Paid (recipients' name, social security number & amount):

______ SSN: ______ ... $ ______

Penalty on Early Withdrawal of Savings ... $ ______

Moving Expenses Related to a Job Change

Distance from old home to old job ... ______ ... From old home to new job ... ______

Amount paid to ship & store goods ... $ ______ ... Transportation & lodging ... $ ______

Credits (complete items only if applicable)

Child and Dependent Care

Provider name, address, social security or employer number & amount paid

1: ______ ... $ ______
2: ______ ... $ ______
3: ______ ... $ ______

Total $ ______

Child name & amount paid (total for all children must equal total for all providers)

1: ______ ... $ ______
2: ______ ... $ ______
3: ______ ... $ ______

Total $ ______

Adoption Credit

Child's name, social security number & date of birth: ☐ Special Needs ☐ Foreign ☐ Disabled

______

List amounts:

	Prior Year	***Current Year***
Qualified expenses ...	$	$
Benefits received ...	$	$
Prior year credit ...	$	

Residential Energy Credits (include copies of receipts & certificates)

Address of property ______

List amounts:

Qualified insulation or material system ...	$	Qualified circulation fan ...	$
Qualified exterior windows ...	$	Qualified solar electric property ...	$
Qualified exterior doors ...	$	Qualified solar water heater ...	$
Qualified metal roof ...	$	Qualified small wind energy property ...	$
Qualified energy efficient building property ...	$	Qualified geothermal pump ...	$
Qualified boiler or furnace ...	$	Qualified fuel cell pump ...	$

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Individual Income Tax Organizer

Itemized Deductions (Complete this page only if greater than standard deduction)

The standard deduction for the various filing statuses are as indicated:

	2015	2014	2013
Married filing joint	$12,600	$12,400	$ 12,200
Head of Household	9,250	9,100	8,950
Single or married filing separate	6,300	6,200	6,100

Medical Expense Deductions

Medical, dental & vision insurance premiums … $ ________

Long-term care insurance premiums … … … $ ________

Medical expenses not reimbursed by insurance (out of pocket) including prescriptions, physicians, clinics/hospitals, vision & hearing aids, etc. … … … … … … … … $ ________

Miles driven for medical purposes ________

(Note: nondeductible items include life or disability insurance, nonprescription drugs, health supplements and health programs)

Charitable Contributions

Cash or check donations … … … … … … $ ________

(you must have receipt for all individual contributions over $250)

Miles driven for volunteer work ________

Non-monetary donations of $500 or less … $ ________

(Goodwill, Salvation Army, Amvets, etc.)

For non-monetary donations of $500 or more, provide name of organization, description of items donated, the original value of the items at purchase and the value at the time you donated them (attach Form 1098-C for donations of vehicles/boat)

Taxes Paid

Real estate property taxes … … … … … … $ ________

(ad valorem on personal residence or 2nd home)

State ☐ income or ☐ intangible taxes … $ ________

Personal property taxes … … … … … … … $ ________

(if on vehicle, must be based on vehicle value)

Sales tax paid on autos, boats or RVs purchased for personal use or on materials used for home improvement … … … … … … … … $ ________

Local sales tax rate ____ % (if your state rate is 6% and you pay 7% locally, your local rate is 1%)

Miscellaneous Expense Deductions

List tax return preparation fees, union/professional dues, continuing education, job search, uniforms, safety deposit box, investment expenses, gambling losses, etc. List each description & amount.

________ … $ ________

________ … $ ________

________ … $ ________

________ … $ ________

________ … $ ________

Unreimbursed employee business expenses - attach list or complete the ***Business Organizer*** .

Interest Expense Deduction

Personal residence 1st mortgage interest & points (on Form 1098) … … … … … … $ ________

Principal balance of 2nd mortgage on primary personal residence $ ________

Personal residence 2nd mortgage interest & points reported on Form 1098 … … … $ ________

Second home 1st mortgage interest & points reported on Form 1098 … … … … $ ________

If you pay mortgage interest to an individual for a seller financed mortgage please provide:

Name & social security number … ________

Address … ________

Interest paid this year … … … … … … $ ________

Private mortgage insurance (PMI, for a primary or 2nd home bought in 2007 or later) … $ ________

Investment interest (interest paid on loans used to acquire investment property) … $ ________

Personal, consumer interest (credit cards, vehicle, etc.) is not deductible. If you purchased or refinance your home, provide a copy of the closing statement. Rental property mortgage interest & taxes should be entered on the ***Rental Property Tax Organizer*** . Business interest & taxes should be entered on the ***Business Expense Organizer*** .

Other Notes or Questions:

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Electronic organizers with prior year numbers are available upon request.