



## CONRADO & COMPANY

### COMMON PERSONAL TAX DOCUMENTATION CHECKLIST

This checklist is a general reminder and some items may not apply to you

#### INCOME

- ☐ W-2 Employment
- ☐ 1099-R Retirement Acct distribution or pension
- ☐ 1099-A Social Security or Disability Retirement
- ☐ 1099-B Stock Portfolio Gains & Losses
- ☐ 1099-Int Interest income earned
- ☐ 1099-Div Divedend earnings
- ☐ W-2G Gambling winnings
- ☐ 1099-Misc Miscellaneous Income
- ☐ 1099G Unemployment Received

#### ITEMIZED DEDUCTIONS

- ☐ Medical, dental, vision expenses out of pocket (must exceed 7.5% of income)
- ☐ Sales tax paid on vehicle, boat or motorhome
- ☐ Real estate or property tax
- ☐ Car, motorcycle, RV registration fees
- ☐ Mortgage interest 1098 paid on primary residence
- ☐ Hud-1 Settlement statement (purchase new primary residence)
- ☐ Cash or check donation amount
- ☐ Non cash donations, ex. clothing, furniture, Goodwill, etc.
- ☐ Unreimbursable job expenses for employees, see worksheet
- ☐ Investment expenses
- ☐ Job Expenses > See below
- ☐ Gambling Loss Statements (only if W-2G winnings reported)

#### CREDITS

- ☐ Child or dependant care
- ☐ 1098-T Higher Education Tuition & Expenses (Books)
- ☐ Residential energy efficiency home improvements
- ☐ Adoption expenses

### BUSINESS & SELF-EMPLOYMENT DOCUMENTATION

#### WORKSHEETS

- ☐ Rental Property Worksheet
- ☐ Self Employed Worksheet
- ☐ 2106 Specialized Employment Expense Worksheets