



# THE TAX SHACK, INC

## CHECKLIST FOR INDIVIDUALS

Please call us or go to [www.thetaxshack.com](http://www.thetaxshack.com) to get additional checklists for:  
Rentals, Businesses, Daycares, and Farmers.

INCOME		DEDUCTIONS	
<b>Unable to work due to Covid?</b>		1095-A Form (Health Exchange Participants)	
Do you have an IP Pin Number?		Health Insurance Premiums	
W-2 Taxpayer		Prescriptions	
Spouse		Doctors, Dentists, Hospitals, etc.	
1099-R PENSION/ANNUITY/IRA Taxpayer		Medical Equipment	
Spouse		Medical Mileage	
Social Security Income Taxpayer		Medical Transportation	
Spouse		HSA - Contributions	
Unemployment Income Taxpayer		Mortgage Interest - Main Home	
Spouse		2nd Mortgage - Main Home	
Interest Income		Property Tax - Main Home	
Dividend Income Ordinary		Mortgage Interest - Second Home	
Capital Gains		Property Tax - Second Home	
Property Sale: Principal		Property Tax - Other Properties	
Interest		Purchase or Refi (HUD1 Statement)	
PURCH DATE: SALE DATE:		Sales Tax Paid (receipted)	
BRING IN CLOSING STATEMENTS		<b>Charity Receipts - Monetary</b>	
K-1 PARTNER, S-CORPORATION, TRUST		Charity Receipts - Goods/Property	
1099-B SALE OF STOCK (Even if Losses)		Volunteer Mileage	
(NEED PURCH DATE, SALE DATE, COST, SALES PRICE)		Gambling Losses - Receipts/Logs	
Alimony Received (Pre-2019 Decree)		IRA Contributions - Traditional Taxpayer	
HSA - Distributions		Spouse	
1099-NEC or 1099-MISC		IRA Contributions - ROTH Taxpayer	
1099-K MERCHANT SERVICES		Spouse	
1099-C CANCELED DEBT		Other IRA Contributions	
1099-Q QUALIFIED EDUCATION PLANS		College/University - Form 1098-T	
1099-S REAL ESTATE SALES		NEED PAYMENT SUMMARY FROM SCHOOL	
W-2G GAMBLING WINNINGS		NEED RECEIPTS FOR BOOKS/FEE/SUPPLIES	
Other Income		Student Loan Interest - 1098-E	
Self-Employment (CHECKLIST ON WEB SITE)		Educator Expenses (Primary/Secondary Educators)	
Rental Income (CHECKLIST ON WEB SITE)		Alimony Paid (Pre-2019 Decree)	
Farm Income (CHECKLIST ON WEB SITE)		<b>EST. TAX PAYMENTS QTR 1</b>	
<b>Did you trade in cryptocurrency?</b>		<b>QTR 2</b>	
<b>Do you invest in QOF/QOZ property?</b>		<b>QTR 3</b>	
<b>Do you own foreign assets/accounts?</b>		<b>QTR 4</b>	
<b>PLEASE NOTIFY YOUR TAX PREPARER OF ANY CHANGES IN MARITAL STATUS, DEPENDENTS, ADDRESS, PHONE NUMBER, OR BANK ACCOUNT.</b>			