

2018 Tax Preparations

Income:

2018

w-2's _____

1099-int (interest) _____

1099-div(dividends) _____

1099-G)tax refunds _____

Alimony received _____

1099-MISC(income) _____

1099-B(capital Gain/loss Brokerage account) _____

Sale of any property/assets _____

1099-R (IRA/401K/PENSION DISTRIBUTIONS) _____

k-1 (Business income/loss) _____

1099-G (unemployment) _____

1099-SSR (Social Security) _____

Other income _____

Income Adjustments:

Teacher expenses _____

Health Savings Account _____

SEP/SIMPLE Contributions _____

SE Heath Insurance premiums _____

Contributions to IRA's _____

1098-Student loan interest _____

Tuition and fees (college) _____

Deductions and Credits:

Medical & Dental Expenses:

Insurance premiums: _____

Co-pays & doctor/professionals: _____

Lab & x-ray: _____

Prescriptions: _____

Therapy & long term care cost: _____

Eye care: _____

Dental expenses: _____

Mileage/travel expenses: _____

Other medical expenses: _____

Taxes: _____

Real estate taxes paid: _____

Local & State Taxes paid: _____

Sales Tax paid: _____

Foreign Taxes paid: _____

Estimated taxes paid: _____

Home Expenses:

Mortgage interest (1098-int): _____

Mortgage insurance premiums (PMI insurance): _____

Energy improvements: _____

Windows/Exterior doors: _____

Installation: _____

Other home improvements: _____

Charity donations and Gifts:

Cash:

Who: _____ When: _____ How much: _____

Items:

What: _____ To Whom: _____ When: _____

Mileage:

Why: _____ When: _____ For Whom: _____ How many: _____

Other items:

What: _____ when: _____ to whom: _____ how much/cost: _____

Casualty & Theft:

When: _____ How much was recovered: _____

What was lost: _____

How or what happened: _____

misc Expenses:

union dues _____

work expenses _____

Child/dependent Care

Child care: who: _____ when: _____ how much paid: _____

Education expenses: (1098-T): _____

Where: _____ for whom: _____ how much: _____

Retirement Savings contributions:

401(K)'s: _____

Traditional, SEP, SIMPLE, IRA's: _____

ROTH Contributions: _____

Business Expenses: Schedule C preparations:

Gross Receipts/Income (1099-misc) :

Advertising:

Business Travel:

 Lodging:

 Transportation:

 Meals :

 Other:

Commissions and Fees:

Communication:

Contract Labor:

Insurance

 Health:

 Business:

 Workman's Comp:

Interest:

Legal and Professional fees:

Meals

Office Expenses:

Rental Expenses:

Repairs & Maintenance:

Supplies:

Taxes & Licenses:

Utilities:

Postage:

Printing:

Dues & Subscriptions:

Memberships:

Bank Fees:

Mileage:

tolls:

Parking:

Home office deduction:

Size of office:

Utilities total for house:

Decor:

Research & Development

Credit Card Process fees:

Uniforms:

Business Gifts

Conferences

Equipment purchases
