

# Tax Team of New England

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## DOCUMENT CHECKLIST

**Income:** Check all that apply and include supporting documentation, if available

Wages & Salaries (W-2 Forms)	<input type="checkbox"/> Y <input type="checkbox"/> N	IRA Distributions (1099-R)	<input type="checkbox"/> Y <input type="checkbox"/> N
Interest (1099-Int)	<input type="checkbox"/> Y <input type="checkbox"/> N	401(k), or Pension (1099-R)	<input type="checkbox"/> Y <input type="checkbox"/> N
Dividends (1099-Div)	<input type="checkbox"/> Y <input type="checkbox"/> N	Rental Property* (1099-MISC)	<input type="checkbox"/> Y <input type="checkbox"/> N
State Tax Refund (1099-G)	<input type="checkbox"/> Y <input type="checkbox"/> N	Unemployment	<input type="checkbox"/> Y <input type="checkbox"/> N
Alimony Received	<input type="checkbox"/> Y <input type="checkbox"/> N	Social Security Income (1099-SSA)	<input type="checkbox"/> Y <input type="checkbox"/> N
Self-Employment (Business Income) (1099-MISC)*	<input type="checkbox"/> Y <input type="checkbox"/> N	Gambling winnings (W2G)	<input type="checkbox"/> Y <input type="checkbox"/> N
Stock or Mutual Fund sale (1099-B)	<input type="checkbox"/> Y <input type="checkbox"/> N	Other Sources of Income?	<input type="checkbox"/> Y <input type="checkbox"/> N
		Ministry Housing Allowance Detail	<input type="checkbox"/> Y <input type="checkbox"/> N

**Adjustments:** Check all that apply and include requested documents, if available

Educator Expenses	<input type="checkbox"/> Y <input type="checkbox"/> N	Penalty on early withdrawal of savings	<input type="checkbox"/> Y <input type="checkbox"/> N
Health Savings Account (Form 8889)	<input type="checkbox"/> Y <input type="checkbox"/> N	Alimony Paid (attach information)	<input type="checkbox"/> Y <input type="checkbox"/> N
Moving Expenses	<input type="checkbox"/> Y <input type="checkbox"/> N	IRA Deduction	<input type="checkbox"/> Y <input type="checkbox"/> N
Self-Employed Retirement Plans	<input type="checkbox"/> Y <input type="checkbox"/> N	Student Loan Interest (1098-E)	<input type="checkbox"/> Y <input type="checkbox"/> N
Self-Employed Health Insurance	<input type="checkbox"/> Y <input type="checkbox"/> N	Educational Tuition (1098-T)	<input type="checkbox"/> Y <input type="checkbox"/> N

**Itemized Deductions:** Check all that apply and include requested documents, if available

Medical / Health expenses	<input type="checkbox"/> Y <input type="checkbox"/> N	Gifts by cash or check (attach list)	<input type="checkbox"/> Y <input type="checkbox"/> N
State Income Taxes (Form W2, etc.)	<input type="checkbox"/> Y <input type="checkbox"/> N	Gift by <u>non</u> -cash or check (Form 8283)	<input type="checkbox"/> Y <input type="checkbox"/> N
Real Estate Taxes	<input type="checkbox"/> Y <input type="checkbox"/> N	Suffer catastrophic loss (Form 4684)	<input type="checkbox"/> Y <input type="checkbox"/> N
Home Mortgage Interest (Form 1098)	<input type="checkbox"/> Y <input type="checkbox"/> N	Tax Preparation Fees Paid	<input type="checkbox"/> Y <input type="checkbox"/> N
Mortgage Refinance	<input type="checkbox"/> Y <input type="checkbox"/> N	Residential Energy Credits (Form 5695)	<input type="checkbox"/> Y <input type="checkbox"/> N
Mortgage Insurance Premiums	<input type="checkbox"/> Y <input type="checkbox"/> N	Adopt a child	<input type="checkbox"/> Y <input type="checkbox"/> N

**Miscellaneous\*:** Check all that apply

Sell a home or real estate	<input type="checkbox"/> Y <input type="checkbox"/> N	Any & All notices from the IRS	<input type="checkbox"/> Y <input type="checkbox"/> N
Any & All Form 1099's	<input type="checkbox"/> Y <input type="checkbox"/> N	Payment of Estimated Federal or	<input type="checkbox"/> Y <input type="checkbox"/> N
Refinance Closing Papers	<input type="checkbox"/> Y <input type="checkbox"/> N	Dependent Care Expenses	<input type="checkbox"/> Y <input type="checkbox"/> N
Childcare Provider Information	<input type="checkbox"/> Y <input type="checkbox"/> N	MA Residents (Form MA 1099-HC)	<input type="checkbox"/> Y <input type="checkbox"/> N
Healthcare Credit (Form 1095-A)	<input type="checkbox"/> Y <input type="checkbox"/> N	Household Employee (Nanny, Housekeeper)	<input type="checkbox"/> Y <input type="checkbox"/> N

**\*If this applies, we recommend you meet with your tax professional to discuss your tax situation before dropping off your information.**