



Checklist for 2022 Tax Returns

Income

- ___ Wages (Form W-2)
- ___ Interest Income (Form 1099-INT)
- ___ Dividend Income (Form 1099-DIV)
- ___ Stock Sold (Form 1099-B)
- ___ Real Estate/Home Sold (Form 1099-S)
- ___ Assets Sold (Cars, Coins, Collections)
- ___ Social Security (Form SSA1099)
- ___ Retirement/IRA Distributions (Form 1099-R)
- ___ Self Employed Business Income (Form 1099NEC & 1099Misc)
- ___ S-Corporation Income (Schedule K-1)
- ___ Partnership Income (Schedule K-1)
- ___ Trust & Estate Income (Schedule K-1)
- ___ Rental income and expenses
- ___ Farming & Cattle Income (Form 1099-PATR)
- ___ Oil & Gas Income (Form 1099-Misc)
- ___ Unemployment (Form 1099-G)
- ___ Medical or Health Savings Distributions-HSA (Form 1099-SA)
- ___ Educational Distributions (Form 1099-Q)
- ___ Gambling Winnings (Form W-2G)
- ___ Cancellation of Debt/Mortgage (Form 1099-C)
- ___ Alimony Received (If divorce before 2019)
- ___ Other Income (if not listed above)

Tax Deductions**

- ___ Educator Expenses (Paid by Teachers)
- ___ Student Loan Interest (Form 1098-E)
- ___ Self-Employed Health Insurance Premiums (Paid Personally)
- ___ Alimony Paid (If divorce before 2019)
- ___ IRA/SEP/SIMPLE/Contributions (Form 5498)
- ___ Medical expenses paid or doctors, dentists, vision, etc (must be paid in 2022. Don't include pre-tax insurance premiums deducted from your paycheck)
- ___ Sales tax on major purchases
- ___ Property Taxes paid on Personally Owned Real Estate
- ___ Mortgage Interest (Form 1098)
- ___ Charitable Contributions
- ___ Non-Cash Charitable Contributions
- ___ Hurricane or other Disaster losses
- ___ Childcare expenses statement
- ___ College Tuition expenses (Form 1098T)
- ___ Gambling Losses (Limited to Winnings)

Other

- ___ IRS Pin Letter 2940C with "Pin" # (If applicable)
- ___ Copy of your ID
- ___ Copy of 2021 tax returns (for new clients)
- ___ Marketplace health insurance (Form 1095A)
- ___ Quarterly Estimated Tax Payments (amounts paid per quarter)
Federal 1st _____ 2nd _____ 3rd _____ 4th _____
State 1 st _____ 2nd _____ 3rd _____ 4th _____

**Please note that expenses for a deduction must be paid in 2022 not just billed/incurred