INDIVIDUAL CHECKLIST
(Not all items will pertain to you)

	INCOME		**EXPENSES**
____	W2's - Wages, Salary Income	____	Medical/Dental Expenses (not paid by Health Savings Account)
____	1099 Int/Div - Interest & Dividend Income	____	Taxes Paid (RE Tax, Personal Property Tax)
____	1099R - IRA/Pension Income	____	1098 - Mortgage Interest/Mortgage Insurance
____	1099B - Investments Sold	____	Investment Interest
____	1099-S - Property Sold (residence, home, land, etc)	____	Casualty/Theft Losses (storm, water, fire, accident, or stolen)
____	1099SSA - Social Security Income	____	Charitable Contributions (need written receipt of any amount over $250)
		____	Child & Other Dependent Care expenses
	OTHER	____	(Need name, address, & SS# or EIN, & amount Paid)
____	1098T -Scholarship (Grants)	____	1098-E Student Loan Interest Paid
____	1099G - Unemployement Compensation	____	Health Savings Account Contributions
____	Payments from Prior Installment Sale	____	Health Savings Account withdrawals
____	Jury Duty	____	Medical Savings Account Contributions
____	Prizes, Bonuses, Awards, Gambling, Lottery	____	Traditional/Roth IRA Contributions
____	Worker's Compensation	____	529 Contribution
____	Other	____	College Education Expenses (1098-T from school)
		____	Educator Expenses
		____	Any Estimated Tax payments made to IRS or State
		____	**1095A - Health Insurance Marketplace Statement**
		____	1095B/C - Employer Health Insurance Proof of Coverage

Questions - if yes, please provide documentation

____	Did you receive rent from Real estate or other property? Provide income/expenses
____	Did you receive income from gravel, timber, minerals oil, gas, copyrights, patents?
____	**Do you have a foreign bank account, trust, or business?**
____	Do you provide a home for or help support anyone that is not a dependent?
____	Did you receive any correspondence from the IRS or State Revenue Department? Please provide
____	Were there any births, deaths, marriages, divorces or adoptions in your immediate family?
____	Did you give a gift of more than $16,000 to one or more people?
____	Did you have any debts cancelled, forgiven, or refinanced?
____	Did you go through bankruptcy proceedings?
____	Did you pay interest on a student loan for yourself, your spouse, or dependent? Provide 1099
____	Did you pay for yourself, spouse, or dependent to attend classes beyond high school? Provide 1098T
____	Did you have any children under the age of 19 or 19 to 23 year old students with unearned income of more than $1,150?
____	Did you purchase a new alternative technology vehicle or electric vehicle?
____	Did you install any energy property in your residence such as solar water heaters, generators, or fuel cells or
____	energy efficient improvements such as exterior doors or windows, insulation, heat pumps, furnaces, central air
____	conditioners or water heats? If yes, provide receipts & descriptions.
____	**Did you own or have control over any Virtual Currency?**
____	Did you Receive an Identity Theft Protection Pin (Please provide)
____	Did you donate through a QCD directly to a charity?