



Your Tax Return Checklist

Deductions:

Medical:

Insurance _____
 Doctors/Co-Pays _____
 Nursing _____
 Dentist/Braces _____
 Medicines _____
 Hospital/Lab Test _____

Medicare _____
 Long-Term Care _____
 Assisted Living _____
 Eye Wear/Contacts _____
 Hearing Aids _____
 Other _____

Taxes:

Property _____
 Intangible _____

Contributions:

Church _____
 Salvation Army _____
 Goodwill _____
 Veterans' _____
 Other Cash _____
 Households/
 Furniture _____

Interest Expense:

Mortgage _____
 Student Loan _____

Other Deductions:

Union Dues _____
 Alimony _____
 Tax Returns _____
 Safe Deposit _____
 Moving _____
 Education _____
 Child Care _____

Theft/Loss _____
 Travel _____
 Tools/Uniforms _____
 Gambling Losses _____
 Home Office _____
 Job Search _____
 Other _____



Income:

Salaries

Self _____

Spouse _____

Interest/Dividends

Bank/Stock _____

Bank/Stock _____

Bank/Stock _____

Retirement

Pension _____

IRA _____

Annuity _____

401(k) _____

Gambling Wins

Self _____

Spouse _____

Business Income

1099-Misc _____

K-1's _____

Rental Property _____

Other Income

Unemployment _____

Alimony _____

Capital Gains _____

Other _____

Other Notes: