

Kearny Mesa Tax Inc
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Tax Checklist

General Taxable Income

- W-2 forms
- Interest Income: 1099-Int
- Dividend Income: 1099-DIV
- Sales of Stock, Land etc.: 1099-B
- Sales of Real Estate: 1099-S
- State Tax Refund: 1099-G
- Alimony Received or Paid
- Unemployment Compensation Received
- Miscellaneous Income 1099-MISC
- Retirement Income: 1099-R
- Social Security: SSA-1099

Business Income

- Business Income and Expenses
- Rental Income and Expenses
- K-1 Income from Partnerships, Trusts & S-Corps
- Miles Traveled for Business
- Total Miles Driven for the year

Tax Credits

- Child Care Provider Address/ID #/Amounts Paid
- Adoption Expense Information
- Foreign Taxes Paid
- Energy Credits
- Education Credit: Tuition, Books and Fees: Form 1098-T

Expense and Tax Deductions

- Medical Expenses (Insurance, Prescriptions, Doctors, Dentists, Hospitals, Miles driven for medical)
- Home Mortgage Interest Paid: Form 1098
- Real Estate Taxes Paid
- Personal Property Taxes Paid (DMV fees)
- Cash/Check Contributions to Charities
- Non-Cash Contributions to Charities
- Unreimbursed Volunteer Work Expenses
- Miles Traveled for Volunteer Purposes
- Unreimbursed Expenses Related to Your Job
- Union and Professional Dues
- Investment Expenses
- Job-Hunting Expenses
- IRA Contributions
- Student Loan Interest Paid
- Moving Expenses
- HUD Statements for any new mortgage or refinance

Tax Payments

- Estimated Payments Made with ES Vouchers
- Last Year's Tax Return Overpayment Applied to this Year

General Information

- Routing Transit Numbers (RTN) (For Direct Deposit)
- Bank Account Number (For Direct Deposit)