

Common Tax Deductions

Income (Please report and account for all income)

W-2	\$
1099 Misc. (self-employed)	\$
1099-R (Retirement)	\$
1099-B (Stock sales)	\$
1099-Div (Dividend income)	\$
1099-Int (Interest income)	\$
1099-G (unemployment)	\$
1099-SSA (SS income)	\$
W-2G (Gambling winnings over \$600)	\$
1099C (Cancellation of Debt)	\$
1099-SA (Health Savings Account)	\$
Additional income (not listed above)	\$

Economic Impact Payments - *Must Bring- if Applicable*

Letter 6419- Total of Child Tax Credit Received	\$
Letter 6475- Total of 3rd Stimulus Payment Received	\$
You will receive both letters from the IRS- January 2022	

Medical Insurance (Marketplace)

Bring 1095-A, 1095-B or 1095-C	\$
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Medical & Dental Expenses (must exceed 7.5% of AGI)

After Tax health insurance premiums	\$
Out-of-Pocket medical, dental, & Vision	\$
Medical Auto Miles driven	

Dependents

Social Security numbers	
Date of Birth	

Residential (Information is listed on 1098 Form)

Home Mortgage Interest	\$
Mortgage Points paid	\$
Real Estate, Local and State Taxes	\$

Education (Please bring the 1098-T or 1099-Q Forms)

Tuition & Fees paid	\$
529 Plan Distributions- 1099-Q	\$
Annual Statement from Daycare Provider	\$
Daycare's EIN (Tax ID)	\$
Books and Supplies	\$
Student loan interest	\$

Miscellaneous

Major purchases (car, boat etc.) Sales Tax	\$
New Home purchase- Points Paid on Purchase	\$
Cash Donations/Non-Cash Donations	\$

Self-Employed Income (1099, Single-Member LLC, etc.)

Advertising	\$
Car insurance	\$
Commission/Fees	\$
Contract Labor	\$
Cost of Labor	\$
Desk, Chair, Shelving, Storage, Pictures, Paintings	\$
Family Health Insurance	\$
Home Office	\$
Legal & Professional Services	\$
Materials and Supplies	\$
Meals	\$
Mileage	\$
Office Supplies- including laptop/computers	\$
Rent	\$
Repairs/Maintenance	\$
Supplies	\$
Taxes & Licenses	\$
Travel	\$
Uniforms	\$
Vehicle Expenses (tires, oil change, gas, etc.)	\$
Wages	\$
Other Expenses (<i>not listed above</i>)	\$

Rental Property, Royalties & Farm Income

Income	\$
Real Estate Taxes	\$
Repairs/Maintenance	\$
Mortgage Interest	\$
Insurance	\$
Management fees	\$
Auto and Travel	\$
Miles traveled	\$
Supplies	\$
Other Expenses (<i>not listed above</i>)	\$

Armed Forces Moving Expenses (Active Duty Only)

Auto miles driven (total)	\$
Food & lodging during move	\$
Moving companies/Storage units	\$
Moving truck/gasoline	\$

Employee Business Expenses*

* **Only** Expenses associated with those in the following professionals are eligible to deduct expenses this category: Qualified Performing Artists, Fee-based State or Local Government Officials, Armed Forces Reservists and Impairment-related work expenses. Please contact your Tax Time preparer with any questions.