

TAX DATA CHECKLIST

Client Status Changes

	✓		✓
Change of Address	<input type="checkbox"/>	New child / dependent	<input type="checkbox"/>
Marriage/Divorce	<input type="checkbox"/>	Death	<input type="checkbox"/>

Type of Income

	✓		✓
Wages and Salaries	<input type="checkbox"/>	Rental Property Income and Expenses	<input type="checkbox"/>
Interest and Dividend Income	<input type="checkbox"/>	K1 from Partnerships, & Corporations	<input type="checkbox"/>
State Refunds	<input type="checkbox"/>	Farm Income and Expenses	<input type="checkbox"/>
Alimony Received	<input type="checkbox"/>	Unemployment Compensation	<input type="checkbox"/>
Self-employment Income and Expenses	<input type="checkbox"/>	Social Security	<input type="checkbox"/>
Capital Gains/Losses	<input type="checkbox"/>	Out-of-State earnings	<input type="checkbox"/>
Pension and Retirement	<input type="checkbox"/>	Out-of-Country earnings	<input type="checkbox"/>

Reductions to Income

	✓		✓
Educator Expenses	<input type="checkbox"/>	Alimony Paid	<input type="checkbox"/>
Health Savings Account deduction	<input type="checkbox"/>	IRA (Traditional Contribution)	<input type="checkbox"/>
Self Employment Health Insurance Deduction	<input type="checkbox"/>	IRA (ROTH Contribution)	<input type="checkbox"/>
Self Employment SIMPLE, SEP and other	<input type="checkbox"/>	Tuition & Fees	<input type="checkbox"/>

Itemized Deductions

	✓		✓
Medical Expenses	<input type="checkbox"/>	Primary Home Mortgage Interest	<input type="checkbox"/>
Primary Home Property Taxes	<input type="checkbox"/>	Qualifying Home Equity Interest	<input type="checkbox"/>
Vehicle Taxes	<input type="checkbox"/>	Charitable Contributions	<input type="checkbox"/>
Other Property Taxes	<input type="checkbox"/>	Non-Cash Charitable Contributions	<input type="checkbox"/>
Mortgage Insurance Premiums	<input type="checkbox"/>		

Misc Items

	✓		✓
IRS Identity Protection PIN #	<input type="checkbox"/>	Health Insurance MarketPlace 1095-A	<input type="checkbox"/>