



PERSONAL INCOME TAX

◆ CHECKLIST ◆

This is only a checklist of items that may be used in preparing your personal income tax return. Please bring any documents that apply to you:

Personal information to verify

- Social Security numbers and dates of birth for you, your spouse, your dependents
- Current Driver's License or photo ID
- Bank account number and routing number, if depositing your refund directly into your account
- Proof of residency for EIC (Earned Income Credit) and Child Tax Credit

Information about your income

- W-2 forms for you (and your spouse)
- SSA-1099 for Social Security benefits received
- 1099-R, Form 8606 for payments/distributions from IRAs or retirement plans
- 1099-INT, -DIV, -B, or K-1s for investment or interest income
- 1099-G forms for unemployment income, or state or local tax refunds
- Alimony received
- 1099-S forms for income from sale of a property
- Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc.
- 1099-C or 1099-A for any debts cancelled or property abandoned

Deductions and credits

The following items can help reduce the amount of your income that is taxed, which can increase your tax refund, or lower the amount you owe:

- Form 1095-A for Affordable Care Act (health insurance verification)
- Form 1098-E for student loan interest paid (or loan statements for student loans)
- Form 1098-T for tuition paid (or receipts/canceled checks for tuition paid for post-high school)
- For teachers: totals, canceled checks or receipts for expenses paid for classroom supplies, etc.
- Records of IRA contributions made during the year
- Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.)
- Records of Medical Savings Account (MSA) contributions
- Self-employed health insurance payment records
- Records of moving expenses
- Alimony paid
- Child care costs: provider's name, address, tax ID, and amount paid
- Adoption costs: SSN of child; records of legal, medical and transportation costs
- Forms 1098: Mortgage interest, private mortgage insurance (PMI), and points you paid
- Investment interest expenses
- Charitable donations: cash amounts, official charity receipts, canceled checks; value of donated property; miles driven
- Medical and dental expense records totals; amount paid out of pocket for health insurance
- Casualty and theft losses: amount of damage, insurance reimbursements
- Records/amounts of other miscellaneous tax deductions: union dues; unreimbursed employee expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc.)

Taxes you've paid

- Federal and state estimated tax payments
- Real estate taxes paid
- Personal property taxes

Brought to you courtesy of:

Norma's Tax Service

619 NW R.D. Mize Road
Blue Springs, MO 64014

Phone: 816-229-2992 Fax: 816-229-3280

Dec 2016