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### Income Tax Checklist

#### Taxable Income

- W-2's
- Alimony
- Dividend Income-1099-DIV
- Interest Income-1099-INT
- Misc. Income-1099-MISC
- Social Security Income-1099-SSA
- Railroad Retirement-RRB 1099-R
- Sale of Real Estate-1099-S
- Sale of Investments-1099-B
- State Tax Refund-1099-G
- MA Chapter 62F Excess Refund (2022)
- Unemployment Compensation-1099-G
- Business Income and Expenses
- K-1 Forms (Partnerships/Trusts/S-Corps)
- Rental Income and Expenses
- Income Outside United States
- Sale of Crypto Currency

#### General Information

- Bank Account Info
- Copy of Prior Year Return if New Client
- Estimated Taxes Paid
- Proof of Health Insurance Coverage

#### Tax Credits

- Adoption
- Child Care Exp-Address, Tax ID, Amts. Pd
- Foreign Tax
- Education Credits
- Residential Energy (Solar)

#### Itemized Deductions

- Medical & Dental over 7.5% AGI
- Real Estate Taxes
- Personal Property Taxes
- State Taxes Paid on Prior Years
- Mortgage Interest
- Home Equity Interest
- Investment Interest
- Donations
- Volunteer Expenses

#### Adjustments

- IRA Contributions
- Educator Expenses
- Student Loan Interest
- Tuition & Fees