



GUIRGUIS ACCOUNTING SERVICES

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Tax Check List

Personal Data:

- Full names as recorded on your Social Security card for yourself and all dependents
- Date of Birth for yourself and all dependents
- Home Address

Income Items:

- W-2s
- 1099s - R, INT, DIV, MISC., B (Proceeds from Broker transactions)
- Partnership and trust income (K-1s)
- Pensions and Annuities
- Social Security Benefits
- Alimony received
- Jury duty pay
- Gambling and Lottery Winnings
- Prizes and Awards
- Scholarships and Fellowships
- State and Local Income Tax Refunds
- Unemployment Funds Received

Deductible Items:

- Mortgage Interest (1098)
- Second Home Mortgage Interest (1098)
- Real Estate Taxes Paid
- Rent Paid
- Moving Expenses
- IRA Contribution
- Personal Property Taxes (auto, boat etc.)
- Student Loan Interest Paid
- Gifts to Charity (Documented)
- Unreimbursed Expenses for Charity or Work
- Travel Expenses, entertainment, uniforms, union dues, subscriptions, and investment.
- Job-hunting expenses
- Educations Expenses
- Child Care Expenses
- Medical Savings Accounts
- Alimony Paid