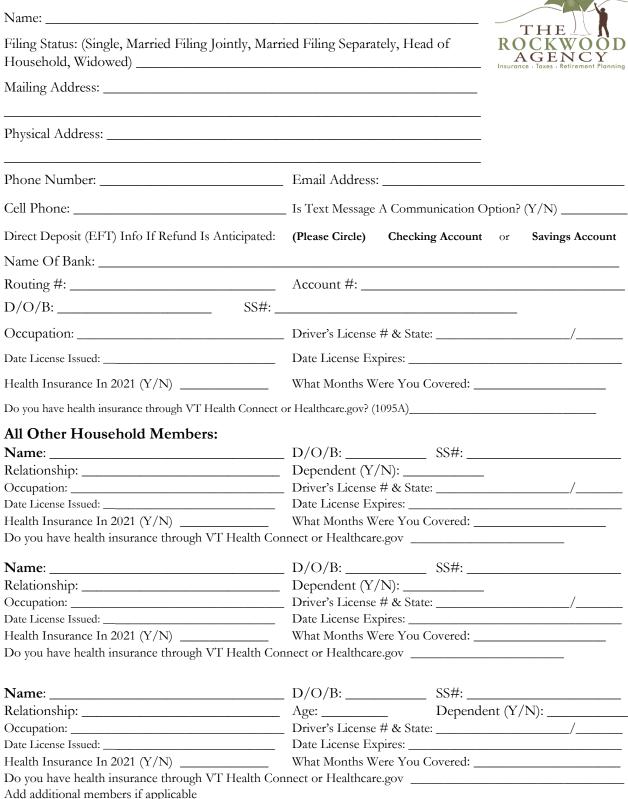
## 2021 Personal Info Questionnaire & Tax Form Checklist PLEASE PROVIDE PREVIOUS YEAR TAX RETURN



# Potential Forms, Deductions, & Credits Tax Form Checklist

### Income Info:

Income from Jobs (W2's) Investment Income Any 1099 or 1098 forms Income from State and Local Income Tax Refunds Alimony Received VT only - Child Support Received Business or Farming Income\* IRA/Pension Distributions (1099-R Form) Rental Property Income\* Unemployment Income (1099-G Form) Social Security Benefits (1099-SSA Form) Income from Sales of Property (1099-S or otherwise) 1095 Health Ins. Reporting Foreign Bank Accts./Foreign Income Gambling Winnings Jury Duty VA Income Life Insurance Proceeds **Bartering Income** Cash

#### Adjustments to your Income:

IRA Contributions Student Loan Interest Medical Savings Account Contributions Moving Expenses For A Job (More than 50 Miles) Contributions to Keogh, SEP, SIMPLE and Other Self-Employed Pension Plans Educator Expenses VT Only- Child Support Paid/Alimony Paid Health Savings Account (HSA 1099-SA)

## Itemized Tax Deductions and Credits:

Advance Child Tax Credit Payment Child Care Costs Education Costs (1098-T Form, Books & Supplies) Adoption Costs Interest You Paid Charitable Donations Casualty and Theft Losses Sales Tax and Fee Deductions for New Vehicle Purchases Job Expenses HUD Statement if Property was Purchased Medical and Dental Expenses Energy-Efficient Home Improvement Gambling Losses

## Taxes You Have Paid:

State and Local Income Taxes State and Local Sales Taxes Real Estate Taxes Personal Property Taxes Large Purchases Made Out Of State

\* Please Request Our Business Owners Deduction Checklist

## The Rockwood Agency

P.O. Box 270 2484 US Route 5 North Windsor, VT 05089 Phone: (800) 691-7341 or (802) 230-4100 Email: therockwoodagency@hotmail.com