



2022 TAX RETURN PREPARATION CHECKLIST

INCOME:

- W-2 Forms
- 1099-Misc., 1099-NEC, Scheduled K-1s/Business Income
- Social Security Form (1099-SSA)
- Pension/IRA/Annuity (1099-R)
- Unemployment Form (1099-G) - **NJ does not mail; must obtain online**
- Interest (1099-Int)
- Dividends (1099-Div)
- Stock Sales (1099-B)
- Rental Income & Expenses
- Gambling Winnings (W2-G)
- Alimony (pre-2019)

EXPENSES:

- Property Tax
- Mortgage Interest (Form 1098) - **Usually available online or with your Dec. Statement.**
- Charitable Contributions
- Medical Expenses
- Gambling Losses
- Student Loan Interest (Form 1098E) – **Usually available online.**
- IRA Contributions
- Alimony (pre-2019)

MISCELLANEOUS:

- Health Insurance Coverage – Please provide form 1095-A, B or C
- New Dependent – Please provide SS# & Date of Birth
- Newly Married – Please provide Spouse's SS# & Date of Birth
- Day Care Expenses (with provider Fed ID#)
- College Student/Tuition Credit – Please provide 1098-T from College for Tuition Credit – **1098-T is available online on student's college portal – CHECK WITH YOUR STUDENT!**
- Estimated Payments (1040-ES Vouchers) – If you paid estimated tax payments to the IRS or the State during the year, please provide us an accurate list of all payments made.

This year we ask...

PLEASE SEND IN ALL OF YOUR TAX DOCUMENTS TOGETHER AT ONE TIME!

Thank you!