

# TAX CHECKLIST

## Income

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## Potential Deductions

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## Additional

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*\*\* For personal use only, I love to organize, but I'm not a tax professional! Always consult your tax professional for tax advice. \*\**



# TAX CHECKLIST

## Possible Income Examples

- W2 from all employers
- 1099s from any work/employment
- 1099s from any investments & bank accounts
- Property sale
- Unemployment income

## Possible Deductions Examples

- Charitable gifts
- Child care expenses
- Job search expenses
- Mortgage tax credits

## Additional Information

- Bank account information for refunds or payments
- Social security numbers of all family members
- Copy of last year's return
- Property tax detail
- Property purchase / sale documents

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