



2011 Individual Tax Documents Checklist

Income: *Taxpayer*

- W-2
- Dividend & Interest Income
- Retirement/Social Security Income
- Partnerships, Estates, Trusts, & S Corp
- Self-Employment Income
- Rents/Royalties Income
- Other Income - **Forms 1099**
(State Income Tax Refunds, Prizes,
Cancellation of Debt)

Spouse

- W-2
- Dividend & Interest Income
- Retirement/Social Security Income
- Partnerships, Estates, Trusts, & S Corp
- Self-Employment Income
- Rents/Royalties Income
- Other Income - **Forms 1099**
(State Income Tax Refunds, Prizes,
Cancellation of Debt)

Itemized Deductions: *for both Taxpayer and Spouse*

- Medical Expenses
- Taxes (Real Estate)
- Vehicle Ad Valorem
- Casualty Loss
- Unreimbursed employee expense
- Job Seeking Expenses
- Tax Preparation Fees
- Investment Expense
- Home Mortgage Interest
- Home Equity Loan
- Cash Charitable Contributions
- Charitable Contributions (Goods)
- Gambling Losses
- Education Expenses
- Misc. Expenses

Additional Information: *for both Taxpayer and Spouse*

- Alimony
- Job Change
- New Primary Residence
- IRA Contributions - (Taxpayer & Spouse)
- HSA Contributions
- Out-of-pocket teacher expenses
- Have they received COBRA health insurance premium assistance?
- Do they have financial accounts that are maintained by a foreign country?