Personal Income Tax
♦2022 Checklist ♦

This is only a checklist of items that may be used in preparing your personal income tax return. Please bring any official documents that apply to you. For all other income and expenses please bring totals only. If a line item applies to you and has "REQUIRED" listed – then additional info must be provided. Reminder: you can complete our client info forms online or in office.

Personal information to verify

- ☐ Social Security numbers and dates of birth for any new dependents
- ☐ IP PIN letter issued annually from IRS (for compromised or stolen identity)
- ☐ **Proof of dependent's residency**. Must have 2022 date, dependent name and your address for all dependents. Examples: 1095A, B or C, grade card or school record, medical records, MO Medicaid, or bank statement

Information about your income

- ☐ W-2 forms for you (and your spouse)
- ☐ 1099-NEC (Non-Employee Compensation)
- ☐ SSA-1099 for Social Security benefits received
- ☐ 1099-R Retirement/Pension income
- ☐ 1099-INT, -DIV, -B, or K-1s for investment or interest income.
- ☐ 1099-K – income received from Venmo, Square, credit cards or other cash apps
- ☐ 1099 HSA – Health Savings Account distributions
- ☐ K-1's from Partnership or S-Corporation income.
- ☐ 1099-G forms for unemployment income, or state or local tax refunds
- ☐ Alimony received and date of divorce OR date of modification
- ☐ 1099-S forms for income from sale of a property
- ☐ Miscellaneous: jury duty, gambling winnings, scholarships, etc.
- ☐ 1099-C or 1099-A for any debts cancelled or property abandoned
- ☐ Self- Employment, Rental or Farm Income (totals of income and expenses by category)
- ☐ 1099B - Sales of Investments, Block chains for virtual currency exchanges or virtual currency profit reports

Deductions and credits

The following items may help reduce the amount of your income that is taxed, which can increase your tax refund, or lower the amount you owe:

- ☐ Form 1095-A for Affordable Care Act -REQUIRED if you had healthcare.gov or marketplace health insurance
- ☐ Form 1095-B, 1095-C (not required but helpful for dependency verification)
- ☐ Form 1098-E for student loan interest paid (or loan statements for student loans)
- ☐ Form 1098-T for tuition paid - this form is REQUIRED for tuition credit
- ☐ For teachers: totals for expenses paid for classroom supplies, PPE, etc.
- ☐ Records of IRA contributions made during the year
- ☐ Records of Medical/Health Savings Account (MSA/HSA) contributions not reported on W-2
- ☐ Out of Pocket Health insurance premium totals (do not include employee premiums)
- ☐ Alimony paid and date of divorce OR date of modification
- ☐ Child care costs: provider's name, address, tax ID, and amount paid
- ☐ Adoption costs: SSN of child; totals and records of legal, medical and transportation costs
- ☐ Forms 1098: Mortgage interest, private mortgage insurance (PMI) on main or 2nd homes, if itemizing
- ☐ Charitable donations: qualified charity receipts, value of donated property with receipt; and mileage
- ☐ Medical & dental expense totals; amount paid out of pocket for health insurance, mileage, (ONLY IF ITEMIZING)

Taxes you've paid

- ☐ Federal and state estimated tax payments and dates paid
- ☐ Real estate tax paid receipt, if itemizing
- ☐ Personal property tax paid receipt, if itemizing

Brought to you courtesy of:

Norma's Tax Service
619 NW R.D. Mize Road
Blue Springs, MO 64014
Phone: 816-229-2992 Fax: 816-229-3280