



THE TAX SHACK, INC

CHECKLIST FOR INDIVIDUALS

INCOME		DEDUCTIONS	
W-2:	TAXPAYER		PRESCRIPTIONS
	SPOUSE		INSURANCE
1099-R PENSION/ANNUITY	TAXPAYER		DOCTORS, DENTISTS, ETC
	SPOUSE		MEDICAL MILEAGE
1099-R IRA DISTRIBUTION	TAXPAYER		PROPERTY TAX: RESIDENCE
	SPOUSE		OTHER
SOCIAL SECURITY	TAXPAYER		STATE INCOME TAX PAID
	SPOUSE		SALES TAX (receipted)
UNEMPLOYMENT	TAXPAYER		MORTGAGE INTEREST
	SPOUSE		2ND MORTGAGE INTEREST
INTEREST			SECOND HOME MTG INTEREST
			POINTS PD PURCHASE RE-FI
			DATE LENGTH OF LOAN
DIVIDENDS:	ORDINARY		INVESTMENT EXPENSE
	CAPITAL GAIN		CHARITABLE CONTRIBUTIONS
INSTALLMENT SALE: PRINCIPAL			
	INTEREST		VOLUNTEER MILEAGE
PURCH DATE:	SALE DATE:		IRA CONTRIBUTIONS TAXPAYER
GROSS PROFIT %:			SPOUSE
K-1 PARTNER, S-CORPORATION, TRUST			MOVING EXPENSE: TRAVEL
1099-B SALE OF STOCK			LODGING
(NEED PURCH DATE, SALE DATE, COST, SALES PRICE)			STORAGE
ALIMONY RECEIVED			EDUCATION EXPENSE: TUITION
1099-Misc			BOOKS/FEES
			STUDENT LOAN INTEREST
SELF-EMPLOYMENT (SEE CHECKLIST)			WORK EXPENSES: UNION DUES
RENTAL INCOME (SEE CHECKLIST)			TOOLS/SUPPLIES
1099-S REAL ESTATE SALES			
EST. TAX PAYMENTS QTR 1			TAX PREPARATION
	QTR 2		ALIMONY PAID
	QTR 3		EARLY WITHDRAWAL PENALTY
	QTR 4		IRA CUSTODIAL FEES
OTHER INCOME			SAFE DEPOSIT BOX
			PLEASE USE BACK FOR ADDITIONAL INFO

PLEASE NOTIFY YOUR TAX PREPARER OF ANY CHANGES IN MARITAL STATUS, DEPENDENTS, ADDRESS OR PHONE NUMBER.