

Taxes Checklist: Cressey Rice Tax Service LLC

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Please See the Client Information Sheet For New Clients or Updated Info.

Forms:

W2's (for every job)	<i>Job/s</i>
1095-A	<i>Marketplace Health Insurance Form</i>
1099-K	<i>Credit Card Processing & 3rd Party Payment App's</i>
1099-NEC/MISC	<i>Self-Employed/Business</i>
1099-R	<i>Retirement Account Income</i>
1099-MISC (maybe)	<i>Rental Income</i>
K-1's or Profit & Loss	<i>Estate, Partnership or Corp.</i>
1099-INT/1099-DIV	<i>Interest Income &/or Dividend Income</i>
1099-B	<i>Stock Sales</i>
1099-G	<i>Unemployment Compensation</i>
W2-G's	<i>Gambling Income</i>
5498	<i>IRA Statement</i>
1099-Sale	<i>Home Sale</i>
1099-C or 1099-A	<i>Canceled Debt</i>
1099-Q	<i>College Savings Plan Distribution</i>
5498-SA or 1099-SA	<i>Health Savings Account or MSA</i>
1098-INT	<i>Mortgage Interest</i>
1098-E	<i>Student Loan Interest</i>
1098-T	<i>Tuition for Higher Education</i>

Other Deductions/Credits:

529 College Plan Contributions
Estimated Taxes paid
Personal Traditional IRA Contributions
Alimony paid or received
Childcare Expenses
Educator Classroom Expenses
College Expenses taxpayers/dependents
Solar Energy/Residential Energy Credit
Electric Vehicle Credit
Medical Costs
Charitable Contributions
Gambling Losses (w/income)
Major Purchases/Sales Tax Paid
Business Income/Expenses
Rental House Income/Expenses
S-Corp/Partnership/Corporation/Estate Returns

Tax Organizer to use:

<i>Miscellaneous</i>
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<i>A: Itemized Deductions</i>
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<i>C: Business Expenses</i>
<i>E: Rental House Expenses</i>
<i>Use Correllating Worksheets</i>

Special Situation not listed? Email or call with questions, thank you!