

# Personal Tax Checklist

Tax time can be stressful but we're here to make sure your prepared!

## Personal Information and Income

### **For You, Your Spouse and Your Dependents**

Full legal name, date of birth, Social Security number, driver's license and last year's tax return

### **Personal Income Statements**

W-2 (for you and your spouse) and all 1099 forms (if self-employed)

### **Unemployment Income or State or Local Tax Refunds**

Form 1099-G

### **Investment or Interest Income**

1099-INT, 1099-DIV, 1099-B and Schedule K-1

### **Home or Property Sale**

Form 1099-S

### **Pension / IRA / Annuity**

Form 1099-R

### **Social Security / RRB Income**

SSA-1099 and RRB-1099

### **Trust and Estate Beneficiary Earnings**

Form 1041, Schedule K-1

### **Health Savings Account Distributions**

1099-SA (distributions tax document)

### **Long-Term Care Reimbursements**

1099-LTC (distribution tax document)

## Common Deductions

- Standard deduction is the fixed dollar amount that reduces your tax liability.
- Itemized deductions are eligible expenses that are deducted from your AGI.
- Below are common itemized deductions. Do you have any of them?
- You should chose whichever deduction is larger causing a larger reduction in your taxable income
- The Reliant Group, Inc can help you decide which deduction will be most beneficial for you!

### Education Expenses

Tuition Statements Form 1098-T and 1098-E,,

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