

Year-End Tax Checklist



Use this to gather the necessary information for your tax preparer. (Weiss clients should use their online tax organizer)

INCOME		
Checklist	If You have...	Please Provide...
	Wages	Form W-2
	Taxable Interest	From 1099 INT
	Tax-Exempt Interest	All relating to tax-exempt interest received
	Dividend Income	1099 DIV
	Alimony Received	Dollar amount received
	Business Income	Income & Expenses
	Capital Gains/Losses	1099-Composite (1099-B)
	IRA Distributions/Pensions/Annuities	1099-R
	Income from Partnerships, S-Corps, Estates, Trusts	K-1
	Unemployment Compensation	1099-G
	Social Security Payments	SSA-1099

ADJUSTMENTS TO INCOME		
Checklist	Item	Please Provide...
	IRA/Roth IRA/SEP/Simple IRA/Keogh Contributions	Contribution amount
	Alimony Paid	Recipient's name, SS#, and amount paid
	Estimated Taxes	Dates and Payments made
	Student Loan Interest	Statement from loan provider of interest paid
	529 plan Contributions	December 31 st account statement(s)

EXPENSES & MISCELLANEOUS ITEMS		
Checklist	Item	Please Provide...
	Medical & Dental Expenses	(Subject to certain limits)
	Mortgage Interest Paid	Form 1098
	Taxes Paid	Real Estate & Personal Property Taxes
	Charitable Contributions	What was donated and name of organization