

## Tax Year 2016 Organizer

### INCOME

#### General Income

- W-2 Form(s) for Wages, Salaries and Tips
- Interest Income Statements: Form 1099-INT & 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Sales of Stock, Land, etc for Capital Gains: Form 1099-B
- Sales of Real Estate: Form 1099-S
- State Tax Refunds: Form 1099-G
- Alimony Paid or Received
- Unemployment Compensation Received
- Miscellaneous Income: Form 1099-MISC

#### Retirement Income

- Retirement Income: Form 1099-R
- Social Security Income and Railroad Retirement Income: Form SSA-1099

#### Business Income (See separate Self-Employed Business and Rental Property Organizers)

- Business Income and Expenses
- Rental Income and Expenses
- Farm Income and Expenses
- Form K-1 Income from Partnerships, Trusts and S-Corporations
- Tax Deductible Miles Traveled for Business Purposes

## **CREDITS, DEDUCTIONS & PAYMENTS**

### **Tax Credits Checklist**

- Adoption Expense Information
- Child Care Provider Address, Tax ID and Amount Paid by Provider and Child
- First Time Home Buyer Tax Credit
- Foreign Taxes Paid

### **Expense and Tax Deduction Checklist**

- Charitable Cash Contributions
- Fair Market Value of Non-cash Contributions to Charities
- Miles Traveled for Volunteering at a Charitable Organization
- Medical Expenses and Mileage
- Home Mortgage Interest from Form 1098
- Real Estate Taxes Paid
- Personal Property Taxes Paid
- State Taxes Paid
- Investment Expenses
- IRA Contributions
- Job-Hunting Expenses
- Moving Expenses
- Casualty and Theft Losses
- Unreimbursed Expenses Related to Your Job
- Union and Professional Dues
- Student Loan Interest Paid
- College Tuition, Books and Fees Paid for Taxpayer and/or Dependents

### **Tax Payments**

- Estimated Tax Payments Made