



## ***FREEDOM FASTax Service***

### **Tax Preparation Checklist**

**Here are a few items to help you in preparing your income taxes. The goal: legally minimize the amount you must pay and obtain the largest possible refund!**

#### **Income**

- W-2 forms for this year
- 1099-Misc. Income
- Alimony Received
- Unemployment Compensation, tax refunds, Forms 1099-G
- Partnership, S Corp, & Trust income; Schedules K-1
- Rents received, jury duty, or gambling winnings
- Pension, Annuity, IRA/401(k) Distributions, Forms 1099-R
- Social Security/RR1 benefits
- Interest Income, Form 1099-Int, 1099-OID
- Dividend Income, Form 1099-Div
- Proceeds from Stock transactions, Form 1099-B

#### **Adjustments to Income**

- Moving Expenses (moves over 50 miles)
- IRA Contributions (Traditional IRA)
- Retirement Plan Contributions (SIMPLE, SEPP, or Keogh)
- Student Loan Interest Paid
- Educator's Expenses (Yes, teachers can deduct classroom expenses!)
- Tuition and Fees (for higher education)
- Medical Savings Account contributions
- Early withdrawal of savings penalties

### **Homeowners**

- Mortgage Interest/Points Paid, Form 1098
- Real Estate Taxes Paid (Property Taxes)
- Sale of home or other real estate, Form 1099-S

### **Parents**

- Dependent care expenses (provider name, address, and phone; tax id# or Social Security #s)
- Education expenses (For higher education; tuition, books, school expenses, etc)
- Adoption expenses

### **Self-employed or business owners**

- Business Income, Forms 1099-Misc or records
- Partnership SE Income, Schedules K-1
- Business expenses (a full explanation of deductible business expenses is available for download on our tax website: [www.FREEDOMFASTax.com](http://www.FREEDOMFASTax.com) )
- Automobile: mileage or lease info

### **Miscellaneous**

- Gifts to charity (both cash/check payments as well as donations of property, etc.)
- Unreimbursed expenses for volunteer work
- Unreimbursed expenses for your job (travel, uniforms, union dues, subscriptions)
- Investment expenses
- Job-hunting expenses (resume preparation, travel related to job search, etc.)
- Tax preparation expenses (Yes, our fees are deductible!!!)
- Gambling losses (up to winnings)
- Auto mileage or lease info (if used for work and not reimbursed by employer)
- Safe deposit box fees
- Medical and dental expenses (included premiums paid, co-pays, eyeglasses, etc)
- Banking info (routing & account numbers for direct deposit of your potential refunds)

**1557 Grand Avenue, Suite A San Marcos, CA 92078**  
**Phone: 760-591-PLAN (7526) Fax: 760-454-4667 Toll FREE: 866-985-FREE (3733)**  
**Email: [connie@freedomfastax.com](mailto:connie@freedomfastax.com) Web: [www.FREEDOMFASTax.com](http://www.FREEDOMFASTax.com)**  
**Freedom Financial Services and FREEDOMFASTax Service are**  
**registered service marks of Freedom Securities & Insurance Services.**