



FORTALEZA

TAX GROUP

EVERYTHING YOU NEED TO
FILE YOUR TAX RETURN

INCOME TAX CHECKLIST

BASIC INFORMATION

- ☐ FULL NAMES AND RELATIONSHIP OF ALL FAMILY MEMBERS
- ☐ SOCIAL SECURITY NUMBERS FOR ALL FAMILY MEMBERS
- ☐ BIRTHDAYS OF ALL FAMILY MEMBERS
- ☐ FILING STATUS - MARRIED, SINGLE, HEAD OF HOUSEHOLD, ETC.
- ☐ FULL ADDRESS

Gather all documents and send them to your accountant as early as possible to maximize deductions and file your income taxes with the IRS

INCOME

- ☐ W2S RECEIVED
- ☐ K1S RECEIVED
- ☐ RENTAL PROPERTY INCOME DOCUMENTATION
- ☐ TAX REFUNDS FROM THE STATE
- ☐ DOCUMENTATION RELATED TO ANY OTHER INCOME RECEIVED
- ☐ 1099s RECEIVED (INTEREST, DIVIDENDS MISCELLANEOUS, CAPITAL GAINS, ETC.)
- ☐ UNEMPLOYMENT BENEFIT STATEMENTS
- ☐ SOCIAL SECURITY BENEFIT STATEMENTS
- ☐ ALIMONY
- ☐ OTHER BUSINESS INCOME

DEDUCTIONS

- ☐ IRA CONTRIBUTIONS
- ☐ IRA WITHDRAWALS
- ☐ MORTGAGE INTEREST
- ☐ REAL ESTATE TAXES
- ☐ ANY OTHER TAXES
- ☐ CHARITABLE CONTRIBUTIONS (CASH, MILES, DRIVEN, OTHER DONATIONS, ETC)
- ☐ MEDICAL EXPENSES (INCLUDING INSURANCE PREMIUMS IF SUBSTANTIAL AFTER TAX PREMIUMS PAID)
- ☐ UNREIMBURSED EMPLOYEE EXPENSES (PERSONAL EXPENSES PAID FOR BUSINESS, JOB SEARCH COSTS, UNIFORMS, ETC.)
- ☐ CHILD AND DEPENDENT CARE EXPENSES
- ☐ BUSINESS USE OF HOME EXPENSES (SQ. FOOTAGE OF OFFICE VS. SQ. FOOTAGE OF HOME)
- ☐ QUESTIONS ABOUT ANY OTHER DEDUCTIONS