



INDIVIDUAL TAX CHECKLIST



Check All That Apply to You & Provide Supporting Documents

Reporting All Income

- ☐ Wages (Form W-2)
- ☐ Interest Income (Form 1099-INT)
- ☐ Dividend Income (Form 1099-DIV)
- ☐ Stock Sold (Form 1099-B)
- ☐ Real Estate/Home Sold (Form 1099-S)
- ☐ Assets Sold (Cars, Coins, Collections)
- ☐ Rent Income (Form 1099-Misc)
- ☐ Farming & Cattle Income (Form 1099-PATR)
- ☐ Sole Proprietor Business (Forms 1099-Misc)
- ☐ S-Corporation Income (Schedule K-1)
- ☐ Partnership Income (Schedule K-1)
- ☐ Trust & Estate Income (Schedule K-1)
- ☐ Oil & Gas Income (Form 1099-Misc)
- ☐ State Refund (Form 1099-G)
- ☐ Social Security (Form SSA)
- ☐ Unemployment (Form 1099-Misc)
- ☐ Gambling Winnings (Form W-2G)
 - ☐ Gambling Losses to Extent of Winnings
- ☐ Alimony Received (Form 1099-Misc)
- ☐ IRA/Annuity Distributions (Form 1099-R)
- ☐ Retirement Distributions (Form 1099-R)
- ☐ Educational Distributions (Form 1099-Q)
- ☐ Medical Savings Distributions (Form 1099)
- ☐ Health Savings Distributions-HSA (Form 1099-SA)
- ☐ Cancellation of Debt/Mortgage (Form 1099-C)
- ☐ Other Income

Tax Deductions

- ☐ SEP/SIMPLE/IRA Payments (Form 5498)
- ☐ Student Loan Interest (Form 1098-E)
- ☐ Health Savings Contributions-HSA (Form 1099-SA)
- ☐ Moving Expenses Not Reimbursed (Over 50 Miles)
- ☐ Self-Employed Health Insurance Premiums
- ☐ Alimony Paid
- ☐ Oklahoma 529 Education Plan Contributions
- ☐ Unreimbursed Medical Expenses Paid
- ☐ Real Estate Taxes
- ☐ Mortgage Interest (Form 1098)
- ☐ Charitable Contributions
- ☐ Non-Cash Charitable Contributions (FMV)

Miscellaneous

- ☐ Estimated Tax Payments (Check Quarters Paid & Provide Amounts)
 - Federal 1st _____ 2nd _____ 3rd _____ 4th _____
 - OK 1st _____ 2nd _____ 3rd _____ 4th _____
- ☐ Had Health Insurance Coverage All Year
 - ☐ Only Had Health Insurance Coverage for Partial Year -
Indicate Dates Covered _____
- ☐ Have Stocks that Became Worthless in 2014?
- ☐ Received a Taxable Inheritance in 2014?

Tax Credits

- ☐ Home Energy Efficient Purchases
- ☐ Child Care Expenses
- ☐ College Tuition Expenses (Form 1098-T)

NOTES: _____

The information contained herein is a basic list for Oklahoma individuals only. More tax documents may be required to prepare your tax return.

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