

# Checklist

## Basic Taxpayer Information

	First Name	Initial	Last Name	Suffix	Social Security No.
Taxpayer					
Spouse					

### General

Please check if "Yes" and provide documentation, if possible.

- 1. Has your marital status changed?
- 2. Are you being claimed as a dependent by another person?
- 3. Are there any changes in the dependent information from 2010?
- 4. Do you have any children under the age of 19 (or 24, if a full-time student) who received more than \$950 in investment income?

### Income

- 5. Do you have compensation not reported on a W-2?
- 6. Do you have any interest income?
- 7. Did you receive any tax-exempt income, such as interest or dividends from municipal bonds or a mutual fund account?
- 8. Did you receive any dividend income?
- 9. Did you receive a state refund in 2011?
- 10. Do you receive alimony?
- 11. Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S-corporations?
- 12. Do you have any self-employment income?
- 13. Did you cease operating any business or rental property?
- 14. Did you barter your services for goods or services from someone else?
- 15. Did you receive, or expect to receive, a Schedule K-1 (or substitute K-1) from a trust, estate, partnership, or S-corporation?
- 16. Did you purchase or sell a principal residence?
- 17. Did you sell any stocks or bonds?
- 18. Did you receive any distributions from an IRA or a retirement plan? (If yes, attach all 1099-R's.)
- 19. Did you receive any unemployment benefits?
- 20. Did you receive Social Security or railroad retirement benefits?
- 21. Did you receive income from a foreign source or pay taxes to a foreign government?
- 22. Do you have gambling or lottery winnings? (If yes, be sure to provide gambling/lottery expenses.)
- 23. During 2011, did you receive payments from a Long-Term Care Insurance contract?
- 24. Was any debt cancelled in 2011?
- 25. Did you receive any other income not mentioned above?

## Deductions

- 26. Are you an educator who paid classroom expenses?
- 27. Did you use your car on the job (other than to and from work)?
- 28. Did you work out of town for part of the year?
- 29. Did you incur any travel or entertainment expenses for business purposes?
- 30. Did you make any contributions to or receive a distribution from an HSA (Health Savings Account) in 2011?
- 31. Did you move because of a change in job location?
- 32. Did you make any contributions to a Keogh or a self-employed SEP plan for 2011?
- 33. Were payments made to a self-employed health insurance plan?
- 34. Did you have to pay a penalty for early withdrawal of savings?
- 35. Did you pay alimony to anyone?
- 36. Did you make any contributions, or plan to make contributions, to a traditional or Roth IRA for 2011?
- 37. Did you pay interest on any student loans?
- 38. Did you pay any educational tuition or fees for you or a dependent?

## Standard/Itemized Deductions

- 39. Did you pay any real estate taxes?
- 40. Do you have a mortgage?
- 41. Did you lose property or have damage to a property due to a casualty, theft, or condemnation?
- 42. Did you make any contributions to charity?

## Credits

- 43. Did you pay expenses for the care of your child or other dependent so you could work?
- 44. Did you pay any adoption expenses?
- 45. Did you purchase a 'clean fuel' or electric hybrid vehicle in 2011?
- 46. Did you make any energy efficient improvements to your main home in 2011?

## Other Taxes

- 47. Did you receive any tips that you did not report to your employer?
- 48. Do you have any household help?

## Payments and Refundable Credits

- 49. Did you make any federal or state estimated payments?
- 50. Did you claim a First-time Homebuyer Credit for a home purchased in 2008?
- 51. Have you filed for an extension for 2011?