

**Small Business Alternatives Inc.**  
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**TAX PREPARATION CHECKLIST – INDIVIDUALS:**

- Income Forms:
  - W-2 – wages
  - W-2G – gambling income
  - 1099-INT - interest
  - 1099-DIV - dividends
  - 1099-B - proceeds from broker or barter transactions
  - 1099-R - pensions and IRA distributions
  - 1099-G – unemployment compensation
  - 1099-C – cancellation of debt
  - 1099-SSA – Social Security
  - 1099-NEC – Non-Employee Compensation
  - 1099-MISC – other income
  - Schedules K-1 from partnerships, S corporations, estates, and trusts
  - All other income reporting statements/1099s, including all copies provided from the payer.
- Health Insurance: Form 1095-A for health insurance if you purchased through a Marketplace/public exchange (Obamacare or Pennie in PA).
- Did you make any “Backdoor ROTH” contributions that are listed on 1099-R(s) received?
- If you are a new client, please provide a copy of last year’s tax returns.
- Copy of the closing statement(s) or HUD if you bought or sold real estate.
- Detail of estimated tax payments made to Federal, State, or Local including date(s) paid.
- List of itemized deductions categorized on a separate sheet for medical, taxes, mortgage interest, property taxes, charitable donations, and other miscellaneous deductions.
- Copy of all acknowledgement letters received from charitable organizations for contributions made during the year.
- Other Adjustments/Deductions/Credits:
  - Health savings account (HSA) or flexible spending account (FSA) contributions
  - Traditional IRA, SEP, Simple IRA, or other qualified retirement plan contributions
  - Student loan interest deduction – Form 1098-E
  - Childcare and Dependent expenses: need care provider name and address, care provider EIN/SSN, and amount(s) paid to care provider for qualifying dependents
  - 1098-T Tuition Statement for college tuition amount(s) paid for yourself or dependents
  - Contributions to Section 529 Tuition Accounts or Section 529A PA ABLE Savings Accounts
  - Amount(s) for any qualifying energy-efficient home improvements (solar, windows, etc.)