MARKO TAX & FINANCIAL SERVICE TAX CHECKLIST:

General Taxable Income
___ Alimony Received or paid before 2019 **(After 2019 Non-deductible)**
___ Dividend Income Statements: **Form 1099-DIV**
___ Interest Income Statements: **Form 1099-INT & 1099-OID**
___ Miscellaneous Income: **Form 1099-MISC**
___ Sales of Real Estate: **Form 1099-S**
___ Sales of Stock, Land, etc.: **Form 1099-B**
___ State Tax Refunds from previous years
___ Unemployment Compensation: **Form 1099-G**
___ Wages, Salaries, and Tips: **Form W-2**

___ Gambling Income: **Form W2-G**

___ Other Taxable income like Prize winnings and Royalties: **Form 1099-MISC**

___ HSA Distributions: **Form 1099-SA**

Retirement Income
___ Railroad Retirement & Social Security Income: **Form SSA-1099**
___ Retirement Income: **Form 1099-R**

Business and Rental Income (See Separate Checklists)
___ Business Income and Expenses
___ Farm Income and Expenses
___ Form K-1 Income from Partnerships, Trusts, and S-Corporations
___ Rental Income and Expenses
___ Tax Deductible Miles Traveled for Business and Rental Purposes

Tax Credits Checklist
___ Adoption Expense Information
___ Child Care credit: Provider Address, I.D. Number and Amounts Paid
___ College tax credits: **Form 1098-T**
___ Foreign Taxes paid

Expense and Tax Deduction Checklist
___ Casualty and Theft Losses
___ Charitable Cash Contributions
___ Doctor and Dentist Payments

___ Fair Market Value of Non-cash Contributions to Charities
___ Home Mortgage Interest: **Form 1098**
___ Home Second Mortgage Interest Paid
___ Hospital and Nurse Payments
___ IRA Contributions: **Form 5498**
___ Last Year's Tax Preparation Fee
___ Medical Expenses for the Family
___ Medical Insurance Paid
___ Miles Traveled for Volunteer Purposes
___ Miles Traveled for Medical Purposes
___ Personal Property Taxes Paid
___ Prescription Medicines and Drugs
___ Real Estate Taxes Paid
___ State Taxes Paid with Last Year's Return (if itemized)
___ Student Loan Interest Paid: **Form 1098-E**
___ Unreimbursed Expenses Related to Volunteer Work

___ HSA Contributions: **Form 5498-SA**

Tax Estimate Payments Checklist
___ Estimated Tax Payments: Federal, State & City – Date made & how much
___ Last Year's Federal and/or state Overpayment/credit applied to This Year

General Information
___ Bank Account Number & Routing **(For direct deposit/debit purposes)**
___ Copy of Last Year's Tax Return **(NEW CLIENTS ONLY)**
___ Dependents' Names, Relationship, DOB and Social Security Numbers
___ Social Security Numbers, DOB & Occupations for You and Your Spouse

___ Amount of stimulus money received in 2020

___ Driver’s License Info: ID#, Issue date & Expiration date