

Quicklist for Individuals

This list is not comprehensive; it is intended give you a summary of the information most commonly included in an Income Tax Return.

Stuff you'll need to do your taxes:

<u>Income</u>	Where to Report	Have	Don't Have
W2 Forms	Line 7 1040	<input type="checkbox"/>	<input type="checkbox"/>
1099 Misc (Non Employee Compensation)	Schedule C	<input type="checkbox"/>	<input type="checkbox"/>
1099 Int (Interest you earned)	Schedule B	<input type="checkbox"/>	<input type="checkbox"/>
1099 Div (dividends you earned)	Schedule B	<input type="checkbox"/>	<input type="checkbox"/>
1099 Stock Proceeds (Income from Sale of Stock)	Schedule D	<input type="checkbox"/>	<input type="checkbox"/>
Taxable Refunds, Credits, or Offsets of State Taxes	Line 10 1040	<input type="checkbox"/>	<input type="checkbox"/>
Rental Income	Schedule E	<input type="checkbox"/>	<input type="checkbox"/>
Alimony	Line 11 1040	<input type="checkbox"/>	<input type="checkbox"/>
Pension or Annuity Income	Line 16 1040	<input type="checkbox"/>	<input type="checkbox"/>
Unemployment Income	Line 19 1040	<input type="checkbox"/>	<input type="checkbox"/>
Social Security Income	Line 20 1040	<input type="checkbox"/>	<input type="checkbox"/>
Gambling Income	Line 21	<input type="checkbox"/>	<input type="checkbox"/>
1099 C or A Cancellation of Debt	Line 21	<input type="checkbox"/>	<input type="checkbox"/>
Sale of Property	Form 4797	<input type="checkbox"/>	<input type="checkbox"/>
 <u>Expenses</u>			
Medical Expenses	Schedule A	<input type="checkbox"/>	<input type="checkbox"/>
Property Taxes	Schedule A	<input type="checkbox"/>	<input type="checkbox"/>
DMV Fees	Schedule A	<input type="checkbox"/>	<input type="checkbox"/>
State and Local Taxes	Schedule A	<input type="checkbox"/>	<input type="checkbox"/>
Mortgage Interest Paid	Schedule A	<input type="checkbox"/>	<input type="checkbox"/>
Points Paid on Refinance	Schedule A	<input type="checkbox"/>	<input type="checkbox"/>
Charitable Contributions Cash and NonCash	Schedule A	<input type="checkbox"/>	<input type="checkbox"/>
Employee Business Expenses	Form 2106	<input type="checkbox"/>	<input type="checkbox"/>
Misc. Expenses, Investment Expenses	Schedule A	<input type="checkbox"/>	<input type="checkbox"/>
Casualty and Theft Loss	Form 4684	<input type="checkbox"/>	<input type="checkbox"/>
Child Care Expenses	Form 2441	<input type="checkbox"/>	<input type="checkbox"/>
 Adjustments to Income			
Moving Expenses (job related; over 50 miles)	Form 3903	<input type="checkbox"/>	<input type="checkbox"/>
Social Security Taxes for Self-Employed	Schedule SE	<input type="checkbox"/>	<input type="checkbox"/>
Alimony Paid	Line 31	<input type="checkbox"/>	<input type="checkbox"/>
IRA or SEP Contributions	Line 23, 29	<input type="checkbox"/>	<input type="checkbox"/>

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