

# PITCH CPA<sub>LLC</sub>

## BUSINESS TAX CONSULTING

### Personal Tax Document Checklist

#### Tax documents and Forms to Bring In

- ☐ All W-2's
- ☐ Social Security
- ☐ 1099 INT/DIV
- ☐ 1099 MISC
- ☐ 1099 G
- ☐ Other 1099
- ☐ K-1 Partnerships & S Corp

#### Other Income and Expenses

- ☐ Alimony Received/Paid
- ☐ Scholarships/Grants
- ☐ IRA Contributions/Withdrawal
- ☐ 1098-T Education Tuition Expense
- ☐ Self Employed
- ☐ Jury Duty Pay (not reimbursed)
- ☐ Gambling & Lottery
- ☐ Non-taxable Income
- ☐ Adoption Expenses
- ☐ Investment Income
- ☐ Tips
- ☐ Investment Expenses
- ☐ Interest Paid on Student Loans
- ☐ Child Care Expenses  
Name, EIN# or SSN#, amount paid,  
address

#### Possible Deductions and Credits

- ☐ Medical Miles/Transportation
- ☐ Out of pocket Medical/Dental Insurance
- ☐ HSA or Similar Contribution
- ☐ Medical Expenses (not reimbursed)  
Prescriptions, glasses/contacts, dental,  
medical, hearing aids, hospital & emergency,  
surgery, labs & x-rays, travel & lodging,  
therapy treatments, wheelchair, cane,  
crutches, orthopedic shoes, in-home care.

#### Taxes and Interest You Paid

- ☐ State Income Tax Payments
- ☐ Real Estate Tax/Property tax
- ☐ 1098 Home Mortgage Interest
- ☐ Points Paid at Closing

#### Charitable Contributions and Volunteer Expenses

- ☐ Church
- ☐ College
- ☐ Non-profit
- ☐ Furniture/Clothing Donation
- ☐ Volunteer Expenses (out of pocket)
- ☐ Volunteer Miles Drive

#### Employee Job Expenses and Misc. Deductions

- ☐ Job Related Moving Expenses
- ☐ Unreimbursed Business Expenses
- ☐ Total Annual Business Miles
- ☐ Actual Auto Expenses (gas, interest, repairs)
- ☐ Tools, Equipment, Uniforms
- ☐ Job Seeking Expenses
- ☐ Continuing Education/Related Education
- ☐ Tax Preparation and Advice
- ☐ Union Dues
- ☐ Educator Expenses (receipts required)
- ☐ Hobby Income and Expenses
- ☐ Safe Deposit Box

#### Other

- ☐ Casualty and Theft Losses  
Accident, fire, theft, natural disasters
- ☐ Clean energy Credits
- ☐ Affordable Healthcare Documents,  
including 1095-A

#### Estimated Tax Payments Made

Date\_\_\_\_\_ Federal\_\_\_\_\_ State\_\_\_\_\_

Date\_\_\_\_\_ Federal\_\_\_\_\_ State\_\_\_\_\_

Date\_\_\_\_\_ Federal\_\_\_\_\_ State\_\_\_\_\_

#### Additional Information

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