

Tax Check List

Personal Data:

- Full names as recorded on your Social Security card for yourself and all dependents
- Date of Birth for yourself and all dependents
- Domicile Address

Income Items:

- W-2s
- 1099s - R, INT, DIV, MISC., B (Proceeds from broker transactions)
- Partnership and trust income (K-1s)
- Pensions and Annuities
- Social Security Benefits
- Alimony received
- Jury duty pay
- Gambling and Lottery Winnings
- Prizes and Awards
- Scholarships and Fellowships
- State and Local Income Tax Refunds
- Unemployment Funds Received

Deductible Items:

- Mortgage Interest (1098)
- Second Home Mortgage Interest (1098)
- Real Estate Taxes Paid
- Rent Paid
- Moving Expenses
- IRA Contribution
- Personal Property Taxes (auto, boat etc.)
- Student Loan Interest Paid
- Gifts to Charity (Documented)
- Unreimbursed Expenses for Charity or Work
- Travel Expenses, entertainment, uniforms, union dues, subscriptions and investment expenses
- Job-hunting expenses
- Educations Expenses
- Child Care Expenses
- Medical Savings Accounts
- Adoptions Expenses
- Alimony Paid

REMEMBER, IF YOU SPEND MONEY TO MAKE MONEY IT WILL BE DEDUCTIBLE AND IT'S MY JOB TO DEDUCT IT FOR YOU!

LOW INCOME SENIORS WHO DON'T HAVE TO FILE FEDERAL TAXES MAY BE ELIGIBLE FOR THE MASSCHUSETTS CIRCUIT BREAKER CREDIT WHICH CAN BE UP TO \$870!