

# SALUDO ENTERPRISES, INC.

Saludo's Tax & Accounting Professional Services

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## INDIVIDUAL TAX CHECKLIST

### FOR NEW CLIENTS:

- ☐ 1) Current Picture IDs for yourself and spouse if married
- ☐ 2) If carrying dependents:
  - ☐ a. Birth certificates and social security cards
  - ☐ b. Verification of residency (mayor's verifications, school records, shot records, etc)
- ☐ 3) Copy of previous year's tax return for you and your spouse
- ☐ 4) If direct deposit preferred: Bank account number and routing number  
(Must be a joint account if filing joint)

### INCOME:

- ☐ 1) W-2 forms
- ☐ 2) 1099-MISC Forms for independent contractor work
- ☐ 3) 1099-NEC Forms for non-employee compensation
- ☐ 4) Miscellaneous income (jury duty, gambling winnings, medical savings account, scholarships, etc)
- ☐ 5) SSA-1099 for Social Security benefits received
- ☐ 6) 1099-R form 8606 for payments/distributions from IRA's or retirement plans
- ☐ 7) 1099-C for cancellation of debt
- ☐ 8) 1099-INT, -DIV, -B, or K-1's for investments or interest income
- ☐ 9) 1099-S forms for income from sale of property
- ☐ 10) Business or farming income – profits/loss statement, capital equipment information  
(Schedule C worksheet available upon request)
- ☐ 11) Rental property income and expenses: profit/loss statement, suspended loss information  
(Schedule E worksheet available upon request)
- ☐ 12) Cryptocurrency & stocks, form 1099-B

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## ADJUSTMENTS TO INCOME:

- ☐ 1) Receipts for any qualifying energy-efficient home improvements (ex: solar panels)
- ☐ 2) Records for IRA contributions (Identify if ROTH or Traditional)
- ☐ 3) Form 1098-E for student loan interest paid (or loan statements)
- ☐ 4) Alimony paid: \_\_\_\_\_ When was divorce finalized? \_\_\_\_\_

## DEDUCTIONS AND CREDITS:

- ☐ 1) Childcare costs: provider's name, address, tax ID, and amount paid
- ☐ 2) Education costs: Form 1098-T Education Expenses
- ☐ 3) Adoption costs: SSN of child, records of legal, medical, and transportation costs

## IF ITEMIZING:

- ☐ 1) Charitable contributions (monetary only) Must provide receipts or official statement from organization
- ☐ 2) Form 1098: Mortgage Interest, private mortgage insurance, and points paid
- ☐ 3) Unreimbursed medical and dental expenses or premiums (it is the client's responsibility to retain records of their expenses)
- ☐ 4) Gambling losses (to the extent of your winnings)
- ☐ 5) Casualty and theft losses (amount of damage, insurance reimbursements)
- ☐ 6) Taxes paid:
  - a. State and local income taxes paid
  - b. Real estate taxes paid
  - c. Personal property taxes
  - d. Vehicle licenses fees based on value of vehicle

## OTHER INFORMATION:

- ☐ 1) Estimated tax payments made during the year