

Tax Preparation Checklist



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General Taxable Income

- W-2 Form(s) for Wages, Salaries, and Tips
- Interest Income Statements: Form 1099-INT & 1099-OID
- Dividend Income Statements: Form 1099-DIV
- Sales of Stock, Land, etc.: Form 1099-B
- Sales of Real Estate: Form 1099-S
- State or Local Tax Refunds: Form 1099-G
- Alimony Received or Paid
- Unemployment Compensation Received
- Miscellaneous Income: Form 1099-MISC

Retirement Income

- Retirement Income: Form 1099-R
- Social Security and Railroad Income: Form SSA-1099

Tax Credits Checklist

- Child Care Provider Address I.D. Number and Amounts Paid
- Adoption Expense Information
- Foreign Taxes Paid

Business Income

- Business Income and Expenses
- Rental Income and Expenses
- Farm Income and Expenses

XNE Financial Advising, LLC is a financial service company that focuses on core financial management of individuals and small businesses. An independent, fee-only firm located in the state of Virginia that provides services to individuals & businesses on financial and business management matters with concentration of clients inside the tri-state area of Metropolitan area of the District of Columbia, (DC, MD, and VA) with minor concentration of other states.

Please note, the IRS does not endorse any particular individual tax return

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Business Income (continued)

- Form K-1 Income from Partnerships, Trusts, and S-Corporations
- Miles Traveled for Business Purposes
- Home Office Expenses

Expense and Tax Deduction Checklist

- Medical Expenses for Family
- Medical Insurance Paid
- Prescription Medicines and Drugs
- Doctor and Dentist Payments
- Hospital and Nurse Payments
- Miles Traveled for Medical Purposes
- Home Mortgage Interest from Form 1098
- Home Second Mortgage Interest Paid
- Property Taxes Paid
- State and Local Taxes Paid (if itemized)
- Cash Contributions to Charity
- Fair Market Value of Non-cash Contributions to Charities
- Unreimbursed Expenses Related to Volunteer Work
- Miles traveled for Volunteer programs
- Casualty and Theft Losses
- Amount paid to Professional Tax Preparer
- Unreimbursed Expenses Related to Your Job
- Miles traveled Related to Your Job
- Union and Professional Dues
- Investment Expenses
- Job Hunting Expenses
- IRA Contributions
- Student Loan Interest Paid
- Moving Expenses

Tax Estimate Payments Checklist

- Estimated Payments Made with ES Vouchers
- Last Year's Tax Return Overpayment Applied to This Year
- Off Highway Fuel Taxes Paid