



Crystal Clear Tax Solutions Inc

"Helping you put the pieces together"

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TAX PREPARATION CHECKLIST

Please provide the following information:

- W-2 (wages)
- 1099-G (unemployment)
- 1099-R (pension, IRA distributions, 401K withdrawal)
- 1099 INT (interest)
- 1099 DIV (dividends)
- 1099 B (sales from brokers, such as sale of stocks)
- 1099 SSA (social security income)
- 1099 C (cancellation of debt)
- 1099 G (gambling winnings and losses)
- 1099 G (state tax refund, including kicker)
- 1098 (mortgage interest paid)
- 1098 C (cancellation of debt)
- 1098T (college tuition)
- Property tax paid
- Copy of closing statement if you bought or sold a home
- Detail of _____ estimated tax payments paid to Federal, Oregon, City of Portland, Tri-Met
- Mileage (must have a mileage log) total miles driven on vehicles
Total miles for one or more of the following: Moving, rental, charitable and business
- Charitable Donations (detailed list of items given with totals, organizations names, dates)
- Political Donations
- Alimony paid or received
- IRA contributions (roth or traditional)
- Employee unreimbursed expenses:
Office in home (square footage), mileage, cell phone, work boots, computers, etc.
- Medical (prescriptions, insurance premiums, co-pays, glasses, dental, hearing aids)
Form 1095-A
Form 1095-B
Form 1095-C
HAS form 8889
- Adjustments to income may include educator expense, health savings account, moving expense, tuition, and fees deduction
- Other income (business, rental, 1099K, trustee fees, stipends)