

BRIGHT FUTURE

FINANCIAL SERVICES

Tax Year 2022 Checklist

INCOME

W-2 Wage/Salaries/Tips _____
1099-INT Interest _____
1099-DIV Dividends _____
1099-MISC Self-Employment _____
1099-R Pension, IRA, Rollover _____
W-2G Gambling, Lottery _____
1099-C Cancellation of Debt _____
1099-G Unemployment _____
1099-G State/City Tax Refund _____
1099-B Capital Gains/Losses _____
1099-S Property Sale _____
1099-Q Education (529 Plan) _____
1099-SA HSA Disbursement _____
K-1 for _____
 Partnerships _____
 S-Corporation _____
 Trust _____
 Estate _____
SSA-1099 Social Security _____
RRB-1099 Railroad Retirement _____
Alimony (only if divorce final before 1/1/2020) _____
Rental Real Estate _____
Scholarships/Fellowships _____
Jury Duty _____
Tax Exempt Interest _____
Property Tax Rebate Recovery _____
Foreign Earned Income _____
Homebuyer Credit Recovery _____
Gig Work (Airbnb, Uber, Taskrabbit, etc) _____
OTHER INCOME _____
DEDUCTIONS/CREDITS/TAXES
1098-E: Student Loan Interest _____
1098-T: College Tuition/Fees/Books _____

DEDUCTIONS/CREDITS/TAXES CONTINUED

1095-A: Health Ins. Reporting _____
Alimony Paid (only if divorce final before 1/1/2019) _____
Childcare/Day Camp Expenses (child <13) _____
(We need provider's name, address, and tax ID number)
Household Employers (Nanny Tax) _____
IRA/SEP/SIMPLE Contributions _____
Roth IRA Contributions or Conversion _____
Teacher's Classroom Expenses _____
HSA Contributions _____
Adoption Expenses _____
Self-Employed Health Insurance Premiums _____
Retirement Saver's Credit _____

ITEMIZED DEDUCTIONS

Medical, Dental, & Optical

(Medical total must exceed 7.5% of income to be deductible)

Prescription Drugs _____
Health Insurance Premiums (you paid) _____
Long Term Care Insurance _____
Number of Medical Miles _____
Doctor, Dental, Hospital and Lab Fees _____
Vision, Eyeglasses and Contacts _____
Nursing Home Care _____
Special Needs Education _____

Taxes Paid

(Taxes paid total now capped at \$10,000)
Sales Tax (cars, boats, RVs) _____
Primary Residence Prop Taxes _____
Other Property Taxes (land, second home) _____
Auto License Plate Registration _____
Home Mortgage Interest (Form 1098) _____
Home Equity Loans (Form 1098) _____
(must be used to buy/build/improve property securing debt)
Investment Loans _____
Mortgage Insurance Premiums _____

Contributions

Cash, Check, and Payroll Deductions _____
(Each donation of \$250+ needs written acknowledgement from charity)
Goods _____
(If over \$500, you must have a list of donated items, charity address, and date of donation. If over \$5,000, you need appraisal)
Volunteer Expenses / Mileage _____