

Taxes Checklist: Cressey Rice Tax Service LLC

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Please See the Client Information Sheet For Important 2022 Tax Questions

Forms:

W2's (for every job)	<i>Job/s</i>
1095-A	<i>Marketplace Health Insurance Form</i>
1099-K	<i>Credit Card Processing & 3rd Party Payment App's</i>
1099-NEC/MISC	<i>Self-Employed/Business</i>
1099-R	<i>Retirement Account Income</i>
1099-MISC (maybe)	<i>Rental Income</i>
K-1's or Profit & Loss	<i>Estate, Partnership or Corp.</i>
1099-INT/1099-DIV	<i>Interest Income &/or Dividend Income</i>
1099-B	<i>Stock Sales</i>
1099-G	<i>Unemployment Compensation</i>
W2-G's	<i>Gambling Income</i>
5498	<i>IRA Statement</i>
1099-Sale	<i>Home Sale</i>
1099-C or 1099-A	<i>Canceled Debt</i>
1099-Q	<i>College Savings Plan Distribution</i>
5498-SA or 1099-SA	<i>Health Savings Account or MSA</i>
1098-INT	<i>Mortgage Interest</i>
1098-E	<i>Student Loan Interest</i>
1098-T	<i>Tuition for Higher Education</i>

Other Deductions/Credits:

529 College Plan Contributions	<i>Miscellaneous</i>
Estimated Taxes paid	<i>Miscellaneous</i>
Personal Traditional IRA Contributions	<i>Miscellaneous</i>
Alimony paid or received	<i>Miscellaneous</i>
Childcare Expenses	<i>Miscellaneous</i>
Educator Classroom Expenses	<i>Miscellaneous</i>
College Expenses taxpayers/dependents	<i>Miscellaneous</i>
Solar Energy/Residential Energy Credit	<i>Miscellaneous</i>
Electric Vehicle Credit	<i>Miscellaneous</i>
Medical Costs	<i>A: Itemized Deductions</i>
Charitable Contributions	<i>A: Itemized Deductions</i>
Gambling Losses (w/income)	<i>A: Itemized Deductions</i>
Major Purchases/Sales Tax Paid	<i>A: Itemized Deductions</i>
Business Income/Expenses	<i>C: Business Expenses</i>
Rental House Income/Expenses	<i>E: Rental House Expenses</i>
S-Corp/Partnership/Corporation/Estate Returns	<i>Use Correllating Worksheets</i>

Special Situation not listed? Email or call with questions, thank you!