

# TAX PRINTABLES

printables to help you  
prepare your taxes

# TAX CHECKLIST

## GENERAL

- |                          |  |
|--------------------------|--|
| <input type="checkbox"/> | Bank account & routing number for refunds/payments |
| <input type="checkbox"/> | Bank statements                                    |
| <input type="checkbox"/> | Credit card statements                             |
| <input type="checkbox"/> | Investment statements                              |
| <input type="checkbox"/> | Social Security Numbers for you & family members   |
| <input type="checkbox"/> | Copies of last year's returns                      |
| <input type="checkbox"/> |  |
| <input type="checkbox"/> |  |

## INCOME

- |                          |  |
|--------------------------|--|
| <input type="checkbox"/> | W2 for employment income                               |
| <input type="checkbox"/> | 1099 for misc income-employment, investments, winnings |
| <input type="checkbox"/> | Sale of property                                       |
| <input type="checkbox"/> | Unemployment income                                    |
| <input type="checkbox"/> | Alimony received                                       |
| <input type="checkbox"/> |  |
| <input type="checkbox"/> |  |
| <input type="checkbox"/> |  |

### ADJUSTMENTS/CREDITS

- |                          |                                 |
|--------------------------|---------------------------------|
| <input type="checkbox"/> | 1098 for interest paid on loans |
| <input type="checkbox"/> | Mortgage interest               |
| <input type="checkbox"/> | Student loan interest           |
| <input type="checkbox"/> | Tuition                         |
| <input type="checkbox"/> | Job expenses                    |
| <input type="checkbox"/> | Casualties/theft/losses         |
| <input type="checkbox"/> | Alimony paid                    |

## PAID TAXES

- ☐ Property taxes
- ☐ State taxes
- ☐ Local taxes
- ☐ Vehicle registrations/licenses

## RETIREMENT

- ☐ IRA/401/retirement contributions  
☐ Account information for retirement plans  
☐ rental property information  
☐  
☐  
☐  
☐  
☐  
☐

## MEDICAL

- ☐ medical expenses  
☐ dental exp

## CHARITABLE

- ☐ donation records  
☐ charitable gifts  
☐ volunteer expenses  
☐ tithes  
☐  
☐  
☐

## M

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# TAX CHECKLIST

- ☐ Bank account & routing number for refunds/payments
- ☐ Bank statements
- ☐ Credit card statements
- ☐ Investment statements
- ☐ Social Security Numbers for you & family members
- ☐ W2 for employment income
- ☐ 1099 for misc income - employment, investments, winnings
- ☐ 1098 for interest paid on loans - mortgage, equity, education
- ☐ real estate tax information
- ☐ housing deduction - mortgage/rent paid
- ☐ job expenses
- ☐ IRA/401/retirement contributions
- ☐ medical expenses
- ☐ child care expenses
- ☐ charitable gifts
- ☐ volunteer expenses
- ☐ tax preparation expenses

# TAX CHECKLIST

## *for small businesses*

## GENERAL

- |                          |  |
|--------------------------|--|
| <input type="checkbox"/> | Bank account & routing number for refunds/payments |
| <input type="checkbox"/> | Bank statements                                    |
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| <input type="checkbox"/> | Copies of last year's returns                      |
| <input type="checkbox"/> |  |
| <input type="checkbox"/> |  |
| <input type="checkbox"/> |  |
| <input type="checkbox"/> |  |
| <input type="checkbox"/> |  |

## INCOME

- |                          |                              |
|--------------------------|------------------------------|
| <input type="checkbox"/> | Bank deposits for the year   |
| <input type="checkbox"/> | 1099s for the year           |
| <input type="checkbox"/> | All other income information |
| <input type="checkbox"/> |                              |
| <input type="checkbox"/> |                              |
| <input type="checkbox"/> |                              |
| <input type="checkbox"/> |                              |
| <input type="checkbox"/> |                              |

## SALARIES

- |                          |                            |
|--------------------------|----------------------------|
| <input type="checkbox"/> | Total wages paid           |
| <input type="checkbox"/> | Federal unemployment paid  |
| <input type="checkbox"/> | State unemployment paid    |
| <input type="checkbox"/> | Worker's compensation paid |
| <input type="checkbox"/> | Health insurance paid      |
| <input type="checkbox"/> |                            |
| <input type="checkbox"/> |                            |
| <input type="checkbox"/> |                            |
| <input type="checkbox"/> |                            |

## EXPENSES

- ☐ Interest paid
- ☐ Advertising fees
- ☐ Website fees - host/server/domain name, etc
- ☐ Accountant/book keeping fees

## AUTO/TRAVEL

- ☐ Mileage driven (primary car used for business)
- ☐ Gas purchases (primary car used for business)
- ☐ Airfare

## DONATIONrecords

[illegible]

\*Seek guidance from an accountant and tax preparer.  
These printables are for personal use only. \*

WWW.THIRTYHANDMADEDAYS.COM

# TAX CHECKLIST

[illegible]

# TAX CHECKLIST

- [illegible]

## GENERAL

- ## INCOME

- ## ADJUSTMENTS/CREDITS

- ## PAID TAXES

- ## RETIREMENT

- MEDICAL**

- CHARITABLE

- MISC/EXTRAS**

- [illegible]

## GENERAL

## INCOME

<input type="checkbox"/>	Bank deposits for the year
<input type="checkbox"/>	1099s for the year
<input type="checkbox"/>	All other income information
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	
<input type="checkbox"/>	

## EXPENSES

- ☐ Interest paid
- ☐ Advertising fees
- ☐ Website fees - host/server/domain name, etc
- ☐ Accountant/book keeping fees
- ☐ Legal fees
- ☐ Meals & misc entertainment
- ☐ Bank charges
- ☐

## OFFICE

<input type="checkbox"/>	Basic office information
<input type="checkbox"/>	Mortgage interest
<input type="checkbox"/>	Real estate taxes
<input type="checkbox"/>	Utilities paid
<input type="checkbox"/>	Home insurance
<input type="checkbox"/>	Electronics purchased for business (laptop/iPad)
<input type="checkbox"/>	
<input type="checkbox"/>	

## MISC/EXTRAS

[illegible]

# DONATION *records*

[illegible]