

Cavacas Associates

Personal Tax Checklist

- Social Security numbers
- List of Dependents
- Birthdays
- Address
- W-2
- 1099 Misc
- 1099-R
- 1099-INT (Interest Income)
- 1099-DIV (Dividend income)
- Gain/Losses on Investments
- mortgage interest
- Property Taxes
- If you paid for child care-Name of business/Person, address, Dollar Value
- Student Loan Interest
- 1099 T
- Medical and dental expenses
- Charitable Contributions

