

## **BATS Tax Checklist**

### **Income**

1. **W-2** from all employers which Taxpayers worked during the tax year.
2. **1099-R** from any Pensions, IRA, Annuities, or Investment Accounts.
3. **1099-SSA** for Social Security received during the tax year.
4. **1099-INT** from any Banking Institutions or Investment Accounts.
5. **1099-DIV & 1099-B** from Stocks or Investment Accounts.
6. **W-2G** winnings from gambling activities.
  - a. Were gambling losses the same as winnings? If not, amount of gambling losses?
7. **Settlement Sheets** from any Real Estate Transactions or Refinancing.
8. **Rentals or Business:** Complete specific checklist for those activities.
9. **1099-MISC** if received from something other than business or rentals

### **Deductions**

1. **Charitable Contribution** list with Totals
2. **Medical Expenses** List (if large)
  - a. Health Insurance premiums paid individually
  - b. 1095-A** Health Insurance Subsidy
  - c. Long Term Care Premiums
  - d. Prescription Expenses
  - e. Doctors and Copay Expenses
  - f. Dentist Expenses
  - g. Eye Doctor, Glasses, etc... Expenses
  - h. Miles driven for medical needs
3. **1099-SA** HSA distributions
4. **Real Estate Taxes** Paid
  - a. Principal Residence
  - b. Any other owned Real Estate
5. **1098** – Mortgage Interest
6. **1098-T** Tuition paid for dependents
7. **Child Care Expenses**

### **Payments & Tax Correspondence**

1. **Federal Estimates** – Date and Amount
2. **State Estimates** – Date and Amount
3. Any notices or tax correspondence received in the past year from an Income Tax agency