

# 2023 TAX FORM CHECKLIST



## POTENTIAL FORMS, DEDUCTIONS, & CREDITS TAX FORM CHECKLIST

### **Income Info:**

Income from Jobs (W2's)  
Investment Income  
Any 1099 or 1098 forms  
Income from State and Local Income Tax Refunds  
Alimony Received  
VT only – Child Support Received  
Business or Farming Income\*  
IRA/Pension Distributions (1099-R Form)  
Rental Property Income\*  
Unemployment Income (1099-G Form)  
Social Security Benefits (1099-SSA Form)  
Income from Sales of Property (1099-S or otherwise)  
1095 Health Ins. Reporting  
Foreign Bank Accts./Foreign Income  
Gambling Winnings  
Jury Duty  
VA Income  
Life Insurance Proceeds  
Bartering Income  
Cash

### **Adjustments to your Income:**

IRA Contributions  
Student Loan Interest  
Medical Savings Account Contributions  
Moving Expenses For A Job (More than 50 Miles)  
Contributions to Keogh, SEP, SIMPLE and Other Self-Employed Pension Plans  
Educator Expenses

VT Only- Child Support Paid/Alimony Paid  
Health Savings Account (HSA 1099-SA)

### **Itemized Tax Deductions and Credits:**

Advance Child Tax Credit Payment  
Childcare Costs  
Education Costs (1098-T Form, Books & Supplies)  
Adoption Costs  
Mortgage Interest You Paid  
Charitable Donations  
Casualty and Theft Losses  
Sales Tax and Fee Deductions for New Vehicle Purchases  
HUD Statement if Property was Purchased.  
Medical and Dental Expenses  
Energy-Efficient Home Improvement  
Gambling Losses

### **Taxes You Have Paid:**

State and Local Income Taxes  
State and Local Sales Taxes  
Real Estate Taxes  
Personal Property Taxes  
Large Purchases Made Out Of State

