



FINANCIAL RESOURCE CENTER

FINANCIAL PLANNING . TAX PREPARATION

INCOME ITEMS

- W2 from employer(s)
- Social Security
- 1099 for self employment
- 1099 from pension/annuity
- 1099 from retirement accounts
- 1099 from unemployment
- State / city refunds
- 1099 from investment accounts
- Rental income
- K1 from trust or partnership
- Alimony received
- Gambling/prize income
- Jury duty pay
- Sale of assets (stocks, etc...)

DEDUCTION ITEMS

- Medical and dental expenses
- State and local taxes
- Sales tax
- Home mortgage interest
- Home equity line interest
- Moving expenses
- Property and real estate taxes
- Gifts to charity
- Unreimbursed work expenses
- Investment interest paid
- Gambling losses
- Education expenses
- Student Loan Interest
- Child-care expenses
- Adoption costs
- Alimony paid
- Tax preparation fees
- Retirement plan contributions
- Self employment work expenses

2012 Complimentary Income Tax Checklist

Conveniently located at

23201 Lorain Rd

North Olmsted, OH 44070



\$20 OFF tax prep fee!

Simply refer us a new client and receive \$20 off your invoice!

Financial Resource Center . details on reverse side