



TAX TIPS & PLANNING CHECKLIST

1. Is what I have classified as all **CURRENT EARNED INCOME** and **SOLE PROPRIETORSHIP INCOME** in the form of W2's, Schedules C, E and F?

Yes No

2. Have I included all **PENSION INCOME FORMS 1099-R's** including all IRA rollover transactions, as well as Social Security Forms SSA-1099.

Yes No

3. Do I have any **UNUSUAL INCLUDABLE INCOME** items such as class action lawsuit settlements, jury duty, gambling winnings and medical claims?

Yes No

4. Have I taken all the **ADJUSTMENTS TO GROSS INCOME** I am entitled to, including, but not limited to, IRA contributions and student loan interest?

Yes No

5. Have you thought about **BUNCHING YOUR DEDUCTIONS** by advancing items from future years to accelerate the deductions you can itemize this year?

Yes No

5. Am I eligible for **CURRENT FEDERAL TAX CREDITS** such as child care, non-business energy property credits, education, earned income?

Yes No

Should you wish to take advantage of a free consultation with Mark Sipos to discuss any of the above in the context of your particular situation, just call us.