

Jax Tax Pro

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Personal Tax Checklist

Income

- W2's (All Employees)
- 1099's
- K-1's
- Rental Property/Properties (Income/Expenses)
- Business Income/Expenses
- Other/Miscellaneous Income

Deductions

- Medical Expenses (Out of Pocket)
- Taxes (Real estate, State/Personal, Sales Tax)
- Interest Paid (Mortgages, Lines of Credit, Home Equity/Student Loans, Investments)
- Education Expenses
- Charitable Contributions
- Energy Efficient/Eco Friendly Improvements

Other

- Real Estate Transactions (closing costs disclosure form)
- Retirement Account Contributions
- Military Moving Costs
- Alimony
- Childcare
- 1095-A Healthcare Forms, Health Savings Account Contributions (post tax)
- Student Loans Interest Paid
- Losses due to Federally Declared Disasters

Important 2021 Deadline Dates

1. **C-Corporation & Individual Tax Returns** _____ **April 15**
2. **Partnership & S-Corporation Tax Returns** _____ **March 15**
3. **Florida Annual Report Renewal** _____ **May 1**
4. **Tangible Tax Returns** _____ **April 1**