

# HUBBARD MENDOZA INCOME TAX INDIVIDUAL 2012 CHECKLIST

## INCOME

ALL W-2 and 1099 Forms  
Dividends  
Sales of Stock  
Social Security  
Unemployment  
Pension, IRA, Annuities  
Self Employment  
Rental and Royalty  
Partnership  
C-Corp and S-Corp  
Estates and Trust  
Gambling Winnings  
Alimony Received  
Sales of Property  
Sales of Residence  
**\*\*Child Support**  
**\*\*Workmens Comp.**  
**\*\*FIA Cash Benefits**  
**\*\*not taxable, needed  
to figure state credits**

## ADJUSTMENTS AND CREDITS

Educator Expenses  
Moving Expenses  
Alimony Paid  
IRA Contributions  
Student Loan Interest  
Child Care Expense  
College Tuition, Books  
One-Half Self-Employment Tax  
HAS Contribution

## LOSSES

\*\*Gambling  
**(Deductible only to the extent  
of winnings claimed as income.  
Losses include losing lotto  
printouts from casino).**  
\*Casualty i.e. fire, theft, flood  
**\*Must exceed 10% of AGI plus  
100.00 to be deductible.**

## ITEMIZED DEDUCTIONS

### MEDICAL

**Out of pocket medical after  
7.5% of adjusted gross income**  
Medical Insurance  
Long term care insurance  
Dental insurance  
Vision insurance  
Doctor and Dental Bills  
Eyeglasses, Contacts, Exams  
Prescriptions  
Medical Supplies ie crutches, wheel chair  
Qualified Home Improvements  
**Medical Mileage .19 (1/1 thru 6/30)  
23.5 per mile (7/1 thru 12/31)**

### TAXES

Real Estate Taxes  
License Plates Fees  
Primary Residence  
Second Home  
Vacant Property  
Rental Home  
**State Sales Tax \*  
qualified deductions\***

### CHARITABLE DONATIONS

Cash Credit Cards or Check with receipts  
Noncash (clothing etc)\*  
\*Dates purchased/donated needed  
if donation is more than \$500  
Churches, Non-Profit Organizations  
**Volunteer Miles Driven .14 per mile**

### INTEREST

Mortgage  
Equity Loans  
Second Homes  
**Include RV and Boat  
interest**  
Investment

## MISC EXPENSES\*

**Included in this category are  
deductible if they exceed  
2% of adjusted gross income**  
Union Dues  
Uniforms  
Professional Dues  
Equipment and Tools  
Safety and Gear  
Tax Prep  
**Business Mileage .51 (1/1 thru 6/30)  
55.5 per mile (7/1 thru 12/31)**  
Cell Phone Expense  
Safe Deposit Box  
Investment Advice  
Qualified Meals  
Qualified Entertainment  
Qualified Job Search  
**Job Hunting Expenses  
when seeking new job in  
same line of work,ie  
Expenses include travel  
cost resume,agency fees...etc**

### **Energy Efficient Home**

IRS has reinstated the  
residential energy credits for  
2011 tax year. Qualifying  
improvements include:  
insulation, exterior windows,  
exterior doors, water heater,  
heat pumps, furnances, water  
boilers, central air and certain  
metal and asphalt roofs.