

TAX PLANNING

What has Changed for You

		Details
1.		
2.	Filing Status	
3.	# Dependents	
4.	# Dependents Under 18	
5.	Taxable Income	
6.	Federal Taxes (paid / refund)	
7.	State Taxes (paid / refund)	
8.		
9.	PERSONAL	
10.	Married / Divorce	
11.	Had Baby	
12.	Parent(s) / Relative Moved-in	
13.	Started Business	
14.	Purchased Rental Property	
15.	Renting Room	
16.	Retiring	
17.	Health Insurance	
18.		
19.		
20.	INCOME	
21.	Job / W-2	
22.	Business / Contractor / LLC	
23.	Business / S-Corp / K-1	
24.	Pension	
25.	IRA Distribution	
26.	Rental Income	
27.	Social Security	
28.	Death Benefits	
29.		
30.		
31.	CAPITAL GAIN / LOSS	
32.	Sold Primary House	
33.	Sold Rental Property	
34.	1031 Exchange Rental	
35.	Sold Stock (gain/loss)	
36.	Traded Crypto Currency	
37.		
38.		
39.	ASSETS	
40.	Purchased Rental Property	
41.	Purchased Business Equip.	
42.		