



Mid-Year Tax Planning Checklist

Dependents and Filing Status	Yes	No	Comment
Did your address change?			
Did your marital status change?			
Were there any changes in dependents?			
Are you supporting anyone not living with you?			
Are you separated or divorced with child(ren), what does your separation agreement or divorce decree say about your parental responsibilities?			
Income	Yes	No	Comment
Have you changed employment?			
Has your income changed?			
Do you have self-employment income or loss?			
Did you start a business, purchase a rental property or farm, or acquire interests in partnerships or S corporations?			
Did you receive any disability or unemployment payments?			
Did you receive alimony?			
Did you surrender any U.S. savings bonds?			
Did you have foreign income?			
Did you buy or sell any stocks, bonds, or other investment property?			
Do you have any worthless securities or uncollectible bad debts?			
Did you make any withdrawals from an education savings account or §529 plan?			
Do you own a second residence or any other real estate? If so, do you rent it out?			
Did you incur a loss because of damaged or stolen property?			
Adjustments to Income	Yes	No	Comment
Did you have any education expenses?			
Did you make any contributions to a Health Savings Account?			
Did you make IRA or SEP contributions?			
Did you pay alimony?			
Did you have student loan interest?			



Itemized Deductions	Ye s	No	Comment
Did you pay out-of-pocket medical expenses (co-pays, prescriptions, braces, hearing aids, etc.)?			
Did you take out a home equity loan this year?			
Did you purchase, sell, or refinance your principal home or second home, or take out a home equity loan?			
Did you face any foreclosure transactions on your personal residence?			
Do you have large charitable contributions?			
Did you use an area of your home for business purposes?			
Do you have records for business-related travel and expenses?			
Did you move in connection with a job?			
Do you have any job search expenses?			
Did you have any expenses related to seeking a new job during the year?			
Do you have any business, medical or charity mileage?			
Did you have any property damaged due to a storm, water, fire, accident or theft?			
Retirement	Ye s	No	Comment
Did you or your spouse reach age 70½?			
Did you or your spouse receive social security benefits?			
Are you or your spouse an eligible to participate in an employer-provided retirement plan such as pension, profit sharing, 401(k), Roth 401(k), or stock purchase plan but failed to do so?			
Did you receive a distribution from a pension, profit sharing, or retirement plan [401(k), IRA, SEP, etc.]? If yes, did you partially or totally roll it over into another IRA or qualified plan within 60 days of the distribution?			
Did you convert part or all of your regular IRA/SEP/SIMPLE IRA into a Roth IRA?			
Have you, or do you plan on contributing to a regular IRA, Roth IRA, SEP, Keogh or SIMPLE plan?			



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Miscellaneous	Ye s	No	Comment
Were you notified by the IRS or state agency of changes to a prior year's return?			
Did you go through bankruptcy or foreclosure proceedings?			
Did you make any estimated federal or state tax payments?			
Were you a resident of (or did you have income in) more than one state?			
Did you pay anyone for domestic services in your home?			
Do you have any daycare costs for your dependents?			
Did you adopt a child or begin the adoption process?			
Did you receive any assistance from your employer to pay for education expenses, child care costs or adoption expenses?			
Did you give a gift of more than \$14,000 to one or more people?			
Is the taxpayer subject to alternative minimum tax (AMT) or have they been in the past? (<i>Note:</i> Consider any planning opportunities that can be used to minimize the AMT impact).			
Did you install any energy efficient property this year?			
Have you failed to maintain health insurance for yourself and your dependents?			
Did you fail to enroll in health insurance through the Marketplace even though you believe you should have?			