

## PERSONAL TAX CHECKLIST – USA

W-slips (all slips received)

Foreign slips received

Any changes in investments – purchases, divestitures

Childcare expenses

Home expenses

401k, Roth, other investment slips

Changes in marital status, children (birth, death, adoption)

Healthcare premiums

Donations (charity, political) and medical expenses (including private health care premiums)

Interest expenses / carrying costs for investments and rental properties

Capital gains / losses

Purchase / Sale of primary residence

Are you a foreign national – require reporting to other government agencies

Digital assets

FBAR backup

Looking forward to working with you during this upcoming tax season!

The OEO Team