

TAX OPTIMIZATION *checklist*



	TASK	DONE
01	Filing Status Optimization - Married Filing Joint or Married Filing Single	<input type="checkbox"/>
02	Health Insurance - Being Deducted in the Right Place?	<input type="checkbox"/>
03	Home Office - Simplified Home Office vs. Actual Expenses	<input type="checkbox"/>
04	Auto Business Use - Keeping Mileage Records?	<input type="checkbox"/>
05	Itemizing vs. Standard Deductions?	<input type="checkbox"/>
06	Retirement Contributions - Are You Maximizing?	<input type="checkbox"/>
07	Any Business Deductions in Personal Accounts?	<input type="checkbox"/>
08	Charitable Deductions (Non-Cash) - Are You Keeping Records?	<input type="checkbox"/>
09	Reasonable Compensation Study (S-Corp Owners)?	<input type="checkbox"/>
10	Child Tax Credit or Other Dependent?	<input type="checkbox"/>
11	Business Structure Tax Optimization: LLC., S-Corp, Partnership?	<input type="checkbox"/>
12	Education Reimbursement Plan (For Employees)?	<input type="checkbox"/>
13	Utilizing Capital Losses from Investments?	<input type="checkbox"/>
14	Estimated Tax Payments?	<input type="checkbox"/>
15	Employ Dependent Children in Business?	<input type="checkbox"/>
16	Communications with Financial Team Members (Tax Preparer, Financial Advisor, Insurance Agent, Attorney, etc.)?	<input type="checkbox"/>
17	Purchasing Business Equipment - Bonus Depreciation Expense?	<input type="checkbox"/>
18	Proactive Planning & Projections for the Current Year - More than Safe Harbor?	<input type="checkbox"/>
19	Revisit Personal Goals and Values to Ensure They're Showing up on the Tax Return?	<input type="checkbox"/>
20	Estate and Gift-Tax Exclusion - Gifted Money (up to 17k) Without Tax Liability?	<input type="checkbox"/>