

Easily gather and provide your tax documents.

Use our checklist below to help you prepare. Go down the list to see what applies to you.

OTHER TAX DOCUMENTS

INCOME DOCUMENTS

	Income from jobs: W-2 for you and	Proof of Insurance: 1095-A, B, and/or C	
	your spouse	🗌 I	TRA contributions
	Investment income: 1099 (-INT, -DIV, -B, etc.), K-1s, stock option information	Π	Energy credits
	Income from state and local income tax		Student loan interest
	refunds and/or unemployment: 1099-G		Medical Savings Account (MSA)
	Taxable alimony received	_	contributions
	IRA/pension distributions: 1099-R, 8606		Moving expenses (for military only)
	Rental property income/expense: Profit/loss statement, rental property		Alimony paid that is tax deductible (date of divorce decree required)
	suspended loss information	Π	Educator expenses
	Social Security benefits: SSA-1099		State and local income taxes paid
	Income from sales of property: Original	ΠI	Real estate taxes paid
	cost and cost of improvements, escrow closing statement, cancelled debt		Personal property taxes—vehicle icense fee based on value
_	information (form 1099-C)	Π	Estimated tax payment made during
	or year installment sale information: ms 6252, principal and Interest lected during the year, SSN and	C	the year, prior year refund applied to current year, and any amount paid with an extension to file.
	address of payer Other miscellaneous income: Jury duty,		Direct deposit information: Routing and account numbers
	gambling winnings, Medical Savings		

Foreign bank account information: Location, name of bank, account number, peak value of account during the year

TAX DEDUCTION DOCUMENTS

- Child care costs: Provider's name, address, tax ID, and amount paid
- Education costs: 1098-T, education expenses including books, supplies, and equipment receipts
- Adoption costs: SSN of child, legal, medical, and transportation costs
- Home mortgage interest and points you paid: Forms 1098 (HUD-1, closing statement from sale or purchase of a home)
- □ Investment interest expense
- Charitable donations: Cash amounts and value of donated property, miles driven, and out-of-pocket expenses
- Casualty and theft losses: Amount of damage, insurance reimbursements
- Other miscellaneous tax deductions: Union dues, unreimbursed employee expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc.)
- Medical and dental expenses

OPTIONS FOR PROVIDING YOUR DOCUMENTS



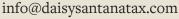
Account (MSA), scholarships, etc.

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