



DAISY SANTANA
TAX SERVICE

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.

INCOME DOCUMENTS

- Income from jobs: W-2 for you and your spouse
- Investment income: 1099 (-INT, -DIV, -B, etc.), K-1s, stock option information
- Income from state and local income tax refunds and/or unemployment: 1099-G
- Taxable alimony received
- IRA/pension distributions: 1099-R, 8606
- Rental property income/expense: Profit/loss statement, rental property suspended loss information
- Social Security benefits: SSA-1099
- Income from sales of property: Original cost and cost of improvements, escrow closing statement, cancelled debt information (form 1099-C)
- Prior year installment sale information: Forms 6252, principal and interest collected during the year, SSN and address of payer
- Other miscellaneous income: Jury duty, gambling winnings, Medical Savings Account (MSA), scholarships, etc.

OTHER TAX DOCUMENTS

- Proof of Insurance: 1095-A, B, and/or C
- IRA contributions
- Energy credits
- Student loan interest
- Medical Savings Account (MSA) contributions
- Moving expenses (for military only)
- Alimony paid that is tax deductible (date of divorce decree required)
- Educator expenses
- State and local income taxes paid
- Real estate taxes paid
- Personal property taxes—vehicle license fee based on value
- Estimated tax payment made during the year, prior year refund applied to current year, and any amount paid with an extension to file.
- Direct deposit information: Routing and account numbers
- 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



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