

FORMS

W2
1099-INT
1099-DIV
1099-R
1099-SA
W2G
1099-G
1099-G

1099-B
1099-C
K-1
1099-MISC
1099-MISC
1099-MISC

INCOME SOURCES

from all employers
Interest earned from bank accounts and investments
Dividends received from stocks and investments
Income from pensions, IRA's, Annuities, 401k plans
Social Security income annual statement
Gambling income
Prior year state/local tax refunds
Unemployment compensation received
Alimony received (if divorced prior to January 2019)
Capital gains from stock sale or sale of assets
Cancellation of debt
Income from partnerships, trusts, S-Corporations
Prizes and Awards
Royalty income
Jury duty income

"Above the line" deductions

5498
5498

1098-E
1098-T

Teacher/educator expenses
Self-employed pension (SEP) contributions
IRA contributions
Alimony paid (if divorced prior to January 2019)
Student loan interest
College tuition expenses

Itemized deductions

Medical co-payments to hospitals, doctors, dentists....
Prescription medicine costs
Medical insurance premiums paid out-of-pocket
Medical related mileage
Long-term health care insurance premiums
Real estate taxes paid
Sales tax paid on large items (car, boat, jewelry...)
Home mortgage interest
Mortgage insurance premiums (PMI)
Points paid at mortgage loan closing
Charitable cash gifts
Charitable item gifts (ie: Goodwill)
Mileage associated with charitable activity
babysitting costs while volunteering for charity
Gambling losses
Casualty, theft, disaster losses

Other issues and tax credits

1095-A

Credit for child care expense while you work
Residential energy credits
Marketplace (ACA) insurance