

**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


**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  
Alimony received  
Capital gains from stock sale, or sale of investment assets  
Cancellation of debt from foreclosure or bankruptcy  
Income from partnerships, trusts, S-corps  
Jury duty income  
Prizes and awards  
Royalty income

**DEPENDENT INFORMATION**

8332


Birthdates and social security numbers for all dependents  
Proof of residence (if you get the **Earned Income Credit**)  
Childcare records (for **dependent care tax credit**)  
Non-custodial parents need release from custodial parent

**"ABOVE THE LINE" DEDUCTIONS**

5498  
5498  
1098-E  
1098-T  
1099-SA


Teacher/educator expenses  
Self-employed pension (SEP) contributions  
Self-employed health insurance premiums  
IRA contributions  
Alimony paid  
Student loan interest  
Moving expenses (job related)  
College tuition expenses  
Health Savings account contributions

**ITEMIZED DEDUCTIONS**

1098  
1098  
1098


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  
Income taxes paid to state and local entities  
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
- Mileage associated with charitable activity
- Babysitting costs while volunteering for charity
- Unreimbursed employee expenses
- Investment fees
- Gambling losses
- Safety deposit boxes (used for storing tax documents)
- Job searching expenses
- Casualty, theft, disaster losses
- Legal fees (related to employment)
- Professional licenses
- Tools required by your employer
- Union dues
- Work related uniforms
- Work related education

**Other issues and tax credits**

- Residential energy credits
- Marketplace (ACA) insurance
- Home office - measurements and receipts
- Quarterly estimated taxes paid

1095-A