

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