Checklist of Information Needed to Complete Your Tax Return
If any item listed applies to you, check the box and attach the information

**Income Information**

☐ Wages (Form W-2)  ☐ Pension Distributions (Form 1099-R)
☐ Interest Income (Form 1099-INT)  ☐ Social Security Benefits (Form 1099-SSA)
☐ Foreign bank accounts, income +/-paid taxes  ☐ State / Local Refunds (Form 1099-G)
☐ Dividend Income (Form 1099-DIV)  ☐ Gambling Income (Form W-2G)
☐ Stock Sale Information/Capital Gains (Form 1099-B)
   - Each stock sale: Date purchased, number of shares bought, amount paid

☐ Other Income
   - Alimony Received
   - Unemployment Compensation (Form 1099-G)
   - Debt Cancellation (Form 1099-C)
   - Disability Income
   - Jury Duty
   - Tip Income
   - Scholarships (Form 1098-T)
   - Education Savings Account Withdrawal (Form 1099-Q)
   - Bartering Income (Form 1099-B)
   - Achieving Better Life Experience Distrib. (Form 1099-QA)

☐ Small Business (self-employed or independent contractor business owner)
   - Business Income (Form 1099-MISC plus items not on 1099-MISC)
   - Business Expenses (Provide list or use the Business Organizer)
   - Vehicle Information

☐ Rental Property
   - Rental Income (Form 1099-MISC)
   - Related Expenses (Provide list or use the Rental Property Organizer)
   - Schedules K-1 from Partnerships, S Corps, Trusts

☐ Sale of Real Estate not qualifying for Personal Residence Exemption
   - Closing Statement – Sale of Property
   - Closing Statement – Purchase of Property
   - List of additions/improvements while you owned the property
   - Forgiveness of Debt income (Form 1099-C or 1099-A)

**Deduction Information:**

☐ IRA Contributions  ☐ Medical Expenses
☐ SEP, Simple, Keogh Plans  ☐ Health Insurance
☐ Student Loan Interest (Form 1098-E)  ☐ Out of Pocket Medical Expenses (& Form 1099-SA)
☐ Student Expenses (Forms 1098-T & 1099-Q)  ☐ Forms 1095-A, 1095-B & 1095-C
☐ Alimony Paid
   - Recipient Name and SS #
☐ Mortgage Interest (Form 1098)
☐ Investment Interest
☐ Cash and Noncash Charitable Contributions
☐ Business or Disaster Casualty/Theft Loss
☐ Medical Expenses
   - Real Estate Taxes
   - Other Taxes (including sales tax paid on the purchase of autos, boats and RVs for personal use)

☐ Tuition Statements (Form 1098-T) & Education Expenses
☐ Copy of voided check (for direct deposit of refund information)
☐ Energy or electric vehicle tax credit information
☐ Closing statement for first-time or long-time homebuyers’ credit

**Credit and Payment Information:**

☐ Child Care Expenses
   - Provide name, address, SS# or EIN, and amount paid for each child
☐ Estimated tax payments (dates and amounts paid)
☐ Legal papers for adoption, divorce or separation involving custody of your dependant children
   - Tuition Statements (Form 1098-T) & Education Expenses
   - Copy of voided check (for direct deposit of refund information)
   - Energy or electric vehicle tax credit information
   - Closing statement for first-time or long-time homebuyers’ credit

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