

Income Tax Filing Information

Important Tax Documents

(Gather these documents in order to file your taxes.)

(W-2) Income from Employers
(W-2G) Gambling Winnings

(1098) Mortgage Interest Statement
(1098-E) Student Loan Interest
(1098-T) Tuition Statements

(1099-A) Acquisition or abandonment of secured property
(1099-B) Stocks, Bonds, Bartering
(1099-C) Canceled Debt
(1099-DIV) Dividend Statement
(1099-G) Unemployment Compensation/State Tax Refunds
(1099-INT) Interest Statements
(1099-LTC) Long Term Care Benefits
(1099-Misc) Miscellaneous Income
(1099-MSA) Medical Savings Accounts
(1099-R) Pension/IRA/401(k) Distributions

(1099-S) Real Estate Sales

(K-1) Shareholder's Share of Income from Partnerships, LLCs or S-Corporations

Alimony
Childcare Fee Statements
Donation Receipts & Statements

IRA Deposits & Withdrawals
Rental Property Income
Settlement Statements (Purchase or Sale of Property)
Social Security Benefits Statement
Veterans Benefits Statement

Any statement you received that says
"Important Tax Document"

Medical Expenses

Insurance (Out-of-Pocket & Withheld from check)

Co-Payments

Prescriptions/Birth

Control/Insulin & supplies

Glasses/Contacts & Solution

Hearing Aids & Batteries

Medical/Dental Exams

Eye Exams

Mental/Physical Therapy*

X-Rays, Labs, Clinics*

Braces/Dental Work

Crutches/Wheelchairs

Orthopedic Shoes

Guide Dogs & their care

Laser Eye Surgery
Ambulance Service
Mileage to Medical Care
Parking & Tolls
Acupuncture/Chiropractor
Artificial Limbs and Teeth
Lodging while away from home for treatments
Nursing Help
Hospital Care (Including Meals & Lodging)
Long Term Care Services
Stop Smoking Programs & Prescriptions*

Weight Loss Programs for specific disease*
Medical Center Treatment for Drug/Alcohol Addiction
Special Schools for physically/mentally handicapped
Transportation for physically/mentally handicapped
Hand Controls for Car
TTY Equipment/Installation
Oxygen Tanks & Equipment

(*Must Be ordered or prescribed by Doctor)

Donations

Cash/Check (ex: Church, Feed the Hungry, etc)

Payroll Deduction (ex: United Way, Red Cross)

Charitable Mileage

Other Charitable Costs

Appraisal fees to determine the value of Donations

Non-Cash Items (ex: Clothing, Furniture, Food)

Date of Donation

Non-Profit Organization Name

Address

Items

Value of Items

Other Deductions

State Tax Payments (Other than job)	Professional Association Fees	Investment & Broker Fees
Estimated Taxes paid	Licenses/Permits	Internet Trading Fees
Real Estate Taxes	Uniforms/Protective Gear	Legal Fees/Advice
Car/Boat Tags	Boots	Safe Deposit Box
Motorcycle Tag	Uniform Maintenance (Cleaning, Alterations)	Professional Magazines
Educational Expenses	Tools required for job	Job Search
Roundtrip Mileage to Class	Continuing Education	Resumes/Printing
Books/Software	Income Tax Preparation	Mileage (for interviews)
Testing Fees	Name of Child Care Provider	Employment Agency Fees
Tuition	Address	Mailing Expenses
Mortgage Interest & Points	Tax Id or SS#	Faxing Charges
Union Dues	ChildCare Fees Paid	Travel

Moving Expenses

(*Must be More than **50 Miles** in connection with Job)

Date of Move	Mileage: old home to old job
Old Home City	Packing Materials
New Home City	Hotels
Truck Rental	Moving Company Fees
Amount Employer Reimbursed	Storage
Mileage: old home to new job	

Rental Property

Each property must be listed separately.

Date Purchased	Fence	Office Supplies/Books
Purchase Price	Filing Fees	Office Rent
Property Address	Fire Extinguishers	Painting
Date Sold	Floors	Pest Control
Selling Price	Furniture	Plants/Flowers
Date Rented	Item	Plumbing
Rent Received	Date of Purchase	Points
Advertising	Cost	Refinance Charges
Appliances	Homeowners Association Fees	Rent Received
Item	Installation Fees	Rent Collection Costs
Date of Purchase	Insurance	Repairs
Cost	Investment Counseling Costs	Roof
Appraisals	Lawn Maintenance	Sanitation
Assessment Fees	Leasehold Improvements	Salaries
Blinds/Curtain	Lease Preparation	Security System
Bookkeeping	Legal Fees	Smoke Alarms
Carpet	Maintenance	Stationery & Supplies
Cleaning Service	Major Improvements	Supplies
Cleaning Supplies	Management Fees	Taxes
Closing Costs	Mileage	Tax Counseling
Commissions	Misc. Items (Light Bulbs, Door	Tax Return Preparation
Contractor Fees	Knobs, Faucets, etc)	Traveling Expenses
Decorating Costs	Mortgage Interest	Utilities
Deposits	Moving Expenses for	Walls
Electrician	Equipment/Appliances	