

# 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

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State Tax Payments  
(Other than job)  
Estimated Taxes paid  
Real Estate Taxes  
Car/Boat Tags  
Motorcycle Tag  
Educational Expenses  
    Roundtrip Mileage to Class  
    Books/Software  
    Testing Fees  
    Tuition  
Mortgage Interest & Points  
Union Dues

Professional Association Fees  
Licenses/Permits  
Uniforms/Protective Gear  
Boots  
Uniform Maintenance  
(Cleaning, Alterations)  
Tools required for job  
Continuing Education  
Income Tax Preparation  
Name of Child Care Provider  
Address  
Tax Id or SS#  
ChildCare Fees Paid

Investment & Broker Fees  
Internet Trading Fees  
Legal Fees/Advice  
Safe Deposit Box  
Professional Magazines  
Job Search  
    Resumes/Printing  
    Mileage (for interviews)  
    Employment Agency Fees  
    Mailing Expenses  
    Faxing Charges  
    Travel

## Moving Expenses

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

Date of Move  
Old Home City  
New Home City  
Truck Rental  
Amount Employer Reimbursed  
Mileage: old home to new job

Mileage: old home to old job  
Packing Materials  
Hotels  
Moving Company Fees  
Storage

## Rental Property

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Each property must be listed separately.

Date Purchased  
Purchase Price  
Property Address  
Date Sold  
Selling Price  
Date Rented  
Rent Received  
Advertising  
Appliances  
    Item  
    Date of Purchase  
    Cost  
Appraisals  
Assessment Fees  
Blinds/Curtain  
Bookkeeping  
Carpet  
Cleaning Service  
Cleaning Supplies  
Closing Costs  
Commissions  
Contractor Fees  
Decorating Costs  
Deposits  
Electrician

Fence  
Filing Fees  
Fire Extinguishers  
Floors  
Furniture  
    Item  
    Date of Purchase  
    Cost  
Homeowners Association Fees  
Installation Fees  
Insurance  
Investment Counseling Costs  
Lawn Maintenance  
Leasehold Improvements  
Lease Preparation  
Legal Fees  
Maintenance  
Major Improvements  
Management Fees  
Mileage  
Misc. Items (Light Bulbs, Door  
Knobs, Faucets, etc)  
Mortgage Interest  
Moving Expenses for  
Equipment/Appliances

Office Supplies/Books  
Office Rent  
Painting  
Pest Control  
Plants/Flowers  
Plumbing  
Points  
Refinance Charges  
Rent Received  
Rent Collection Costs  
Repairs  
Roof  
Sanitation  
Salaries  
Security System  
Smoke Alarms  
Stationery & Supplies  
Supplies  
Taxes  
Tax Counseling  
Tax Return Preparation  
Traveling Expenses  
Utilities  
Walls