

You should check the boxes that are relevant to you to be sure that you have included all your supporting documents and also to ensure that all relevant information is included in the preparation of your Tax Return. This list is not exhaustive as there may be other tax-related documents received by you.

- W-2 or W-2 equivalent
- W-2 G for gambling winnings
- K-1 (Partnership or S-Corporation Income)
- 1099-INT (Interest Income)
- 1099-DIV (Dividend Income)
- 1099-G (Government Payments)
- 1099-MISC (Miscellaneous Payments)
- 1099-R (Pension/IRA/Retirement Distributions)
- 1099-B (Proceeds from Broker and Barter Exchange Transactions)
- 1099-C (Cancellation of Debt)
- 1099-A (Acquisition or Abandonment of Secured Property)
- Form SSA-1099 documenting Social Security payments
- Form RRB-1099 documenting Railroad Retirement Benefits
- Rental Income & Expenses (if you have rental property)
- Self-employment income and expenses
- Form 1098-T – Tuition Expenses and scholarship information
- Form 1095-A - Health Insurance Marketplace Statement
- Form 1095-B - Health Coverage Statement
- Form 1095-C - Employer-Provided Health Insurance and Coverage
- Medical Expenses Information
- Doctor's Fees, Prescriptions, Insurance Premiums
- Eyeglasses and Eye Doctor Fees
- State Tax Refunds
- Real Estate and Other Taxes
- Form 1098 - Home Mortgage Interest Expense
- Cash Donations – name of Church or Charity and amount donated
- Non Cash Donations – detailed evidence for FMVs exceeding \$500
- Ad valorem taxes paid for renewal of car tags
- Dependent Care Information
- Un-reimbursed Employee Expenses: job travel, uniforms, training etc.
- Job Search Expenses
- Repayment of First-time Homebuyers Credit
- Child Care Credit – name, address, Soc.Sec.No. / EIN of Provider
- Moving Expenses – where move is job related

“Accounting for your moves, every step of the way”