TAX INFORMATION CHECKLIST:

Common documents needed to complete your tax returns. Items most often overlooked in **bold**

INCOME/forms marked ""for your tax records""

__ W-2 wage forms
__ Interest income (1099-INT & 1099-OID)
__ Dividend income statements (1099-DIV)
__ Opened bank account/received a bonus?
__ State & local income tax refunds (1099-G)
__ Alimony received
__ Business income including rent (1099-Misc)
__Misc income reported on (1099-Misc)
__Capital Gains or losses/broker transactions
__ Pensions & Annuities IRA Distributions (1099-R)
__ Retirement plan distribution (1099-R))
__ Unemployment compensation (1099-G)
__ Soc. Security/RRI Benefits (SSA-1099, RRB)
__ Partnership, S Co & trust income (Sch K-1)
__ Jury duty pay
__ Gambling winnings (& proof losses)
__ Prizes & awards
__ Scholarships & fellowships
__ Health Savings Account (1099-HSA)
__ Cancellation of Debt Income (1099-C)

EXPENSES

__Teacher/Educator Expenses
__ Health Savings Account for medical expenses
__ IRA, KEOGH & retirement plan contributions
__Alimony paid
__Job related moving expenses
__ Adoption Expenses
__ Early withdrawal penalties on CDs/savings

EDUCATION EXPENSES

__ Student Loan Interest paid (1098-E)
__ Tuition & Education Fees (1098-T)
__ Required school expenses (like books, software)
__ What years you've taken Hope or American Opportunity credits
__Job related education expense, mileage etc

DAYCARE

__ Childcare Expenses not paid by employer
__ Name & address of daycare provider
__ SSN or EIN of Daycare Provider

Itemized Deductions

__ Unreimbursed medical insurance, miles & expenses
__ Mortgage interest paid (1098)
__ Second mortgage interest paid
__ Property tax paid (if not on 1098)
__ Vehicle tabs paid
__ Gifts to charity (cash & non-cash)
__ Unreimbursed expenses related to volunteer work
__ Investment expenses
__ Tax return preparation fees & expenses
__ Union dues
__ Job hunting expenses (not for newly graduated students)

TAXES PAID

__ Employment taxes & other business tax paid
__ Estimated Federal, State, City tax paid (Not on w-2)

MISCELLANEOUS DOCUMENTS

__Records of sale of property that may be taxable/reportable
__ Records to document casualty or theft losses
__ Sale of your home/real estate (1099-S)
__ If sold home, dates of purchase & Sale, Purchase price Sale price cost of improvements etc.
__ Closing documents for home purchase
__ Receipts for installed solar or wind equipment

Notes & Comments

Sund Income Tax Service
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