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As you prepare your tax documents, we wanted to include a list of common items needed to ensure a timely preparation. This list may not include every possible item, so be sure to look out for documents labeled "Important Tax Information Enclosed" as well as items on this list.

### **Income:**

- Earnings from Employers (W2)
- Interest Earned – Checking, Savings, CD's (1099 INT)
- Dividends (1099 DIV)
- Alimony Received
- Unemployment (1099 G)
- State Tax Refund (1099 G)
- Brokerage Year-end Statement (Edward Jones, Merrill Lynch, Etc.)
- Business income - totaled
- Business Expenses – totaled by category
- Farm Income – totaled
- Farm Expenses – Totaled by Category
- Rental Income – Totaled by Property
- Rental Expenses – Each Property Totaled by Category
- Sales of Assets (Income and Cost Basis)
- Sales of Investments (1099 B) (Income and Cost Basis)
- Prizes, Awards, Bonuses, Hobby Income, Jury Duty Pay
- Cancellation of Debt (1099C)
- Pensions/Retirement (1099R)
- Social Security Statement (1099SA)
- K-1's (Partnerships, S Corps)
- Gambling Earnings
- Legal Settlements
- Other Income not listed

### **Itemized Deductions**

- Medical – Out of Pocket
- Medical – Premiums After Tax
- Medical – Mileage
- Home Mortgage Statement (1098)

- Real Estate Taxes
- Personal Property Taxes
- Sales Taxes Paid on Large Items (Cars, RV's, Etc.)
- Moving Expenses for a Job
- Safety Deposit Box Charges
- Casualty Losses
- Contribution Statements
- Charitable Contribution Statements
- Charitable Mileage
- Goodwill, Salvation Army, Etc. - Donation Receipts
- Gambling Losses (if Reporting Winnings)

### **Credits**

- Contribution to 529 Education Plans (Student Name and SSN if Not Dependent)
- Childcare Expenses (Provider ID, Amount)
- Education Expenses (1098T)
- Adoption Expenses

### **Payments**

- Estimated Tax Payments (Date, Amt)

### **Other**

- Teachers Unreimbursed Expenses
- HAS Withdrawals/Contributions
- Contributions to IRA's, SEP's, Etc.
- Withdrawals from IRA's SEP's, Etc.
- Student Loan Interest Paid
- Communication from IRS/State
- 1095 A/B/C from Insurance Provider or Employer
- Alimony Paid