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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 (Ameriprise, 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 – Amounts Paid in 2023

- 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
- HSA 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