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Items You May Need For Tax Return Preparation – Individual Income Tax Returns

Income:

- W2 Forms for This Year
- State Income Tax Refund Amounts – Form 1099-G
- Social Security Income – Form SSA-1099
- Unemployment Income – Form 1099-G
- Interest Income – Form 1099-INT
- Investment or Divided Income Statements – Form 1099-INT& 1099-DIV
- Miscellaneous Income – Form 1099-MISC
- Sales of Stocks or Bonds – Form 1099-B
- Pension or Retirement Income – Form 1099-R
- IRA/401K Distributions – Form 1099-R
- Income from Partnerships, S Corporations, Trusts, & Estates – Schedule K-1
- Self-Employed or Farm Income and Expenses – Form 1099-MISC
- Income and Expenses from Rental Property
- Lottery or Gambling Winnings – Form W-2G
- Alimony Paid or Received
- Jury Duty Pay
- Scholarships and Fellowships
- Income earned by any dependents

Expenses:

- Mortgage or Home Equity Loan Interest Paid – Form 1098
- Purchase or Sale of Residence Papers
- Real Estate or Personal Property Taxes
- Charitable Contributions – Cash and Non-Cash
- Medical, Eye Care, and Dental Expenses
- Unreimbursed Expenses Spent for Your Job
- Educational Expenses for College or Graduate School- For Yourself or Dependent(s)
- Student Loan Interest – Form 1098-E
- Child Care Expenses and Provider Information – Federal ID Number and Address
- Adoption Expenses
- Moving Expenses
- Early Withdrawal Penalties on CD's and Other Time Deposits
- Energy Efficient Home Expenses
- Casualty or Theft Losses, Major Losses over \$10,000
- Medical Savings Account
- IRA and Other Retirement Plan Contributions – If Self-Employed, Identify if for Self or Employees
- Foreign/Other Taxes Paid
- Investment Expenses
- Health Insurance Premium Information – Form 1095-A, B or C (if received)

Please Note: This list is not all-inclusive. If you are unsure of whether a document is tax-related, please send or bring it to us.