

General checklist of items to bring with you to your tax appointment

Income Records		Income Records	
Alimony received		IRA distributions (Form 1099-R) and (Form 5498)	
Business income and expenses		Miscellaneous income (Form 1099-MISC)	
Dividends received (Form 1099-DIV)		Pension, annuity income (Form 1099-R)	
Farm income and expenses		Profit sharing, 401(k) distributions (Form 1099-R)	
Gain from sale of real estate (Form 1099-S, Settlement Statement)		Rents received and rental expenses	
Gain/Loss from sale of securities (Form 1099-B and trade confirmation from original purchase of securities)		Royalty income (Form 1099-MISC)	
Gambling winnings (Form W-2G)		Social Security and Railroad Retirement (Form SSA-1099, Form RRB-1099)	
Income from partnerships, estates, trusts or S corporations (Schedule K-1)		State/local income tax refunds (Form 1099-G)	
Installment sale income		Unemployment compensation (Form 1099-G)	
Interest received (Form 1099-INT)		Wages, salaries, commissions (Form W-2)	
Deductions for Adjusted Gross Income (AGI)		Deductions for Adjusted Gross Income (AGI)	
Alimony paid (Name and social security number of recipient)		IRA, Keogh, SEP and SIMPLE contributions	
Health insurance paid by a self-employed individual		Moving expenses related to your job	
Health Savings Account (HSA) contributions (Forms 5498SA & 1099SA)		Penalties on early withdrawal of savings (CDs)	
Higher education tuition & fees (Form 1098-T limitations apply)		Student loan interest (limitations apply) (Form 1098-E)	
Itemized Deductions		Itemized Deductions	
Casualty and theft losses (unreimbursed by insurance) to the extent they exceed 10% of AGI		<i>IRA custodial fees if paid by separate check*</i>	
Charitable contributions		<i>Job search expenses* (resume preparation, employment agency fees, travel to interviews, etc.)</i>	
<i>Dues* (professional and union)</i>		Medical and dental expenses (unreimbursed by insurance) to the extent they exceed 7 ½% of AGI	
<i>Educational expenses – job related*</i>		Points paid (Settlement Statement or Form 1098)	
<i>Employee business expenses* (Auto, travel, entertainment, etc.)</i>		Real estate taxes paid	
<i>Expenses to maintain investments (ex. management fees)*</i>		<i>Safe deposit box rental fees*</i>	
Federal estate taxes paid on income in respect of a decedent		Special work clothing* (uniforms, shoes, gloves, small tools, etc.)	
Gambling losses (not in excess of gambling winnings)		State and local income taxes paid	
<i>Home office deductions* (utilities, homeowner's insurance, etc.)</i>		<i>Subscriptions to professional and investment publications*</i>	
Interest paid on home mortgages (Form 1098)		<i>Tax return preparation fees*</i>	
* These expenses are deductible to the extent they, in aggregate, exceed 2% of your AGI			
Credits		Credits	
ACA Premium Tax Credit (Form 1095-A) 1095-B & 1095-C		Energy credit for installation of: windows, skylights, exterior doors, insulation, metal roof, HVAC system, flat panel water heater, solar energy system, fuel cell, geothermal heat pump	
Adoption expenses (limitations apply)			
Child and dependent care expenses (amount paid, name, address and social security number for each provider)		Foreign taxes paid	
Education credits (date(s) paid and amount(s) paid for tuition, Form 1098-T)		(Form 1099-INT and/or Form 1099-DIV)	