

TAX DOCUMENTS | INCOME

- Form W-2 from all Employers**
- Form 1099 from all Payors**
 - Include 1099-MISC, 1099-R (Form 8606 if provided), 1099-INT, 1099-DIV, SSA-1099, 1099-B, 1099-C, 1099-G, 1099-S
- Income from all Rental Property or Property Management Activities**
 - Name Type (Single Family, Multi Family) and Address of Property
 - Date of Purchase and Purchase Price
 - List any Property Improvements such as new roof, siding, landscaping, painting, remodeling, etc. with dates and amounts
 - Gather all expenses related to Rental Property or Property Management Activities
 - Interest Payments – Mortgage and Other
 - Real Estate and Other Taxes
 - Maintenance & Repairs
 - Property Management, HOA Fees and/or Commissions
 - Insurance
 - Professional Fees
 - Utilities
 - Travel & Vehicle Mileage
 - Advertising & Marketing
 - Equipment & Appliances Purchased
 - List Type, Dates and Amounts for Depreciation Purposes
- Income from other Investment Activities** (including Stock Bond and Mutual Fund trades)
 - Information related to Trades (Name of Stock, Bond or Mutual Funds, Purchase and Sale Dates, Number of Shares)
 - Gather all expenses related to Investment Activities, Purchase price and Cost of Sale (Commissions and/or Fees)
- Income from Subchapter S Corporations, Partnerships, Estates and Trusts**
 - Include any Form K-1 received
- Other Miscellaneous Income**
 - Unemployment Compensation
 - Gambling
 - Jury Duty
 - Other

SUPPORTING DOCUMENTS | ADJUSTMENTS TO INCOME DOCUMENTS

- Student Loan Tuition – Form 1098-T
- Student Loan Interest – Form 1098-E
- Self-Employment Health Insurance and/or Form 1095 (all copies)
- Qualified Educator Expenses
(Expenses related to teaching activities)
- IRA Contributions or Keogh, SEP, SIMPLE or Self-Employed Pension Plan Contributions
- Moving Expenses
- Energy-Efficient Home Improvements
- Medical Savings Account Contributions
- Alimony Paid

SUPPORTING DOCUMENTS | ITEMIZED DEDUCTIONS - HOME

- Home Loan Interest – From 1098
 - Primary Residence
 - Secondary Residence
 - Home Equity Loan
 - Mortgage Insurance Premiums
 - Mortgage Point
 - Other Investment Interest
- Property Taxes
 - Primary Residence
 - Secondary Residence

SUPPORTING DOCUMENTS | ITEMIZED DEDUCTIONS - MEDICAL EXPENSE

- Insurance Payments
 - Health
 - Dental
 - Eye care
- Medical Travel and/or Mileage
- Medical Expenses
 - Health
 - Dental
 - Eye care

SUPPORTING DOCUMENTS | CHARITABLE DEDUCTIONS

- Gifts to Charities – Cash
- Gifts to Charities – Property
- Mileage
- Prior Year Carryover

SUPPORTING DOCUMENTS | OTHER TAXES

- Sales Taxes**
 - Local Sales Tax Rate
 - List any Large Items Purchased during the year
 - Car
 - Boat
 - Appliances
 - Home Improvements
 - RV
 - Other
- Personal Property Taxes**
- Vehicle License Fees Paid** (Based on Value)

SUPPORTING DOCUMENTS | OTHER ITEMIZED DEDUCTION

- Casualty & Theft Losses**
- Job Related Expenses** (Unreimbursed Travel, Union Dues, Education, Home Use of Office, Publication, Professional Organizations or Dues, etc.)
- Tax Preparation Fees**
- Safe Deposit Box Fees**
- Other Investment Fees**
- Adoption Costs**

SUPPORTING DOCUMENTS | OTHER EXPENSES

- Childcare Related Expenses**
 - Daycare
 - Day camps
 - Other

ADDITIONAL INFORMATION

- Copy of Prior Year Tax Return**
- Estimated Tax Payments Made During the Income Tax Year**
- Application of Prior-year Overpayment of Income Taxes**
- Foreign bank account or investment account information:** location, name of bank, account number, peak value of account(s) during the year, beginning and ending value of account(s) and income from account(s).