

Quick Check List of Income and Possible Deductions

Personal Data

Driver's License(s)
Social Security card(s)
Last year's Federal and State tax returns
Social Security numbers and birth dates of dependents

Child / Dependent Residency (Any one for each dependent)

School Records or Statement
Landlord or Property Management Lease/Statement
Healthcare Provider Statement
Medical Records
Childcare Records
Placement Agency Statement
Social Service Records or Statement
Place of worship records
Indian tribal official statement
Employer statement

Income Data

W-2, earnings statement or last paystub for W-2 download
Self-employed business income and expenses / 1099-MISC
Commissions you received or paid
Pension or retirement income / 1099-R
Unemployment income / 1099-G
Social Security Income / SSA-1099
Alimony paid or received
Lottery or gambling winnings and losses

Real Estate

Real estate taxes paid
Personal property taxes paid (registration of vehicle)
Mortgage, land contract or home equity loan interest paid / 1098
Record of new home purchase or sale
Rental income and expenses

State & Local Taxes

State or local taxes paid
State or local refund amount / 1099-G
Estimated taxes or foreign taxes paid

Savings & Investments

IRA contributions
Interest and dividend income / 1099-INT or 1099-DIV
Statements on stock or bond sales / 1099-B

Family / Medical

Affordable Care Act/Marketplace Annual Insurance Premium Statement

Medical and dental expenses

Child care expenses and provider information

Mileage records to doctor appointments

Work Expenses (Unreimbursed)

Uniforms, union dues/expenses, dues to professional societies, licenses and regulatory fees, subscriptions to professional journals/trade magazines, tools/supplies used in your work, occupational taxes, passport for a business trip, travel, transportation, meals, entertainment, gifts and local lodging related to your work.

Job-related educational expenses

Education Expenses (Unreimbursed)

College Tuition Statement: 1098-T

Classroom expenses for teachers

Tuition, books, supplies/equipment needed for a course of study, notebooks, ebooks, education fees, non-academic fees, student activity fees, athletic fees.

Student loan interest / 1098-E

Other

Charitable donations, cash and non-cash

Casualty or theft losses

Mileage records for travel to and from Goodwill, Salvation Army, charity events, volunteer work, etc.