

Income Sources | REMEMBER TO BRING FORMS WITH YOU

- W-2: Wage and tax statement(s)
- 1099-INT: Taxable and tax-exempt interest income
- 1099-DIV: Dividends and distributions
- 1099-R: Distributions from pensions, annuities, retirement or profit sharing plans, IRAs, insurance contracts, etc.
- 1099-G: State tax refund from previous year and/or Unemployment income
- SSA-1099: Social security received
- Alimony received
- Business income (will need expenses)
- Rental income (will need expenses)
- Provide information about sales of stock, real estate, or other property along with forms 1099-B, 1099-S, or other supporting statements

Adjustments & Credits | FILL OUT WHAT APPLIES TO YOU

ALIMONY

- Amount paid or received: \$ _____
- Social Security number of person receiving alimony: _____

COLLEGE EXPENSES

- Tuition, fees, & books: \$ _____
- Interest paid on student loans: \$ _____

CHILD OR DEPENDENT CARE

- Provider Name: _____
- Address: _____
- ID# (EIN if business, SSN if individual): _____
- Amount paid: \$ _____

EDUCATOR EXPENSES

- Amount paid: \$ _____

Adjustments & Credits Cont.

REAL ESTATE TAXES

Provide settlement statement (HUD-1) if you bought or sold a home, refinanced, or took out a home equity loan.

- Home purchase date: _____
 - When you purchased your new home, did you own a home during any of the three years prior to purchase of your new home? Yes No
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Itemized Deductions

MEDICAL EXPENSES

Medical expenses (must exceed 7.5% of adjusted gross income to be of benefit) Must either have paid the expense during the current tax year or charged the expense on your credit card.

- Health insurance paid out of pocket after tax
- Co-pays and other medical paid
- Prescriptions
- Dental
- Vision including eyeglasses and contacts
- Medical equipment such as hearing aids, wheelchairs, crutches, etc
- Chiropractic care
- Acupuncture
- Miles driven for medical care
- Parking paid at medical facilities

CHARITABLE CONTRIBUTIONS

CASH CONTRIBUTIONS

- Church
- Non-profit organizations

Itemized Deductions Cont.

CHARITABLE CONTRIBUTIONS CONT.

NON-CASH (DOCUMENT EVERYTHING DONATED)

- Clothing
- Furniture (Take pictures)
- Vehicles (Need a 1098-C)
- Electronics
- Household goods
- Toys, etc

TAXES

- Real estate taxes
- Ad Valorem taxes

INTEREST

- Mortgage interest paid (Form 1098 from lender)

OTHER DEDUCTIONS

- Gambling losses
- Legal expenses only if related to producing or collecting taxable income
- Safety deposit box fee

Affordable Care Act Requirements

If you had health/medical insurance through the Healthcare Marketplace (Obamacare), please provide Form 1095-A. You should have received the form in the mail. If not, call the 24/7 line at 1-800-318-2596 (TTY: 1-855-889-4325) or visit www.Healthcare.gov.