

Attachment to Taxpayer Instruction Letter

ORGANIZATION OF TAX RETURN DOCUMENTS

Prior to your meeting with an ATP Assister and to ensure the most efficient use of your time, please collect and organize your tax documents, worksheets and other papers using the checklist below:

INCOME

- W-2 Wages
- 1099-G Box 1 Unemployment (you may need to download this prior to the meeting)
- 1099-G Box 2 State and local refunds
- 1099-INT Interest
- 1099-DIV Dividends
- SSA-1099 (the one with the pink stripe)
- 1099-R/RRB 1099R
- 1099-Misc
- 1099-NEC Non-Employee Compensation
- 1099-B Proceeds from Broker Transactions
- W-2G Gambling Winnings
- 1099-Q Qualified Education Program
- 1099-C Cancellation of Debt
- K-1 Partnership or trust
- Alimony
- Other Income not listed

ADJUSTMENTS

- Health Savings Account
- IRA contribution
- Student Loan Interest
- Educator Expenses
- Alimony Paid

DEDUCTIONS

- Medical and Dental expenses, summarized by following categories
 - Medical/Dental/Vision Insurance
 - Doctor/Dentist/Other Medical Specialist
 - Prescriptions
 - X-rays, Lab Work, etc.
 - Hospital
 - Medical Aides
 - Mileage
 - Other

(Deductions continued)

- Taxes you paid (E.g. Property taxes, estimated taxes, sales tax on large items)
- 1098 Mortgage Interest
- Gifts to Charity totals – cash and/or noncash
- Business Expenses summarized by category (see IRS Schedule C for categories)
 - Note: for business mileage, total vehicle mileage for the year is needed.

CREDITS

- 1098-T Education Credits
- Residential Energy Credit
- Childcare

HEALTH INSURANCE from the MARKETPLACE

1095-A Health Insurance Marketplace Statement