

ORGANIZATION OF TAX RETURN DOCUMENTS

Please have with you Photo ids for yourself and your spouse (if applicable,) and copies of all identity cards: SS cards or Legal residency cards, etc. for *everyone* listed on the tax return in your tax household.

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 1099 (Railroad)
- 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