

## 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

## **IDENTITY PROTECTION PIN**

Current IRS Notice CP01A (dated late December 2024 or January 2025 if mailed to you)