

Personal Information

- New Address, Phone Numbers, Email address
- New Dependent's Social Security cards and DOB

Income and Source Forms

- **Health Ins 1095-A, or proof of coverage**
- W-2 Forms
- 1099-R Forms, Retirement Withdrawals
- 1099-INT/DIV, Interest/Dividend
- 1099-G, State Refund Amount
- 1099-SSA, Social Security Income
- 1099-G, Unemployment
- 1099-MISC, Income/Commissions Received
- 1099-B, Sales of Stocks or Bonds
 - Purchase price and date
- IRA/401K Contributions
- W-2G, Lottery/Gambling Winnings-*losses can be deducted up to the amount of your winnings, with proof.*
- 1099-C, Cancellation of Debt

Business Information

- Commissions Paid
- Self-Employed Business Income and Expenses
- Income and Expenses from Rental Properties-*Contractors paid over \$600 annually are required to receive a 1099-MISC by 2/28/14.*
- K-1, Income from Partnerships, Corporations or Trusts
- Business Mileage Rate- 56 cents

Personal Expenses

- Medical, Eye Care, Dental Expenses-*Must be over 10% of income and 7.5% for seniors. Also include medical mileage.*
- Cash and Non-cash Charitable Donations-*Must provide receipts from the organization.*
- Record of Purchase or Sale of Real Estate
- Form 1098, Mortgage Loan Interest Paid
- Real Estate Taxes Paid
- Moving Expenses
- Educator Expenses
- Tuition and Education Fees
- Student Loan Interest
- Casualty/Theft Loss
- Estimated Taxes Paid
- Foreign/Other Taxes Paid
- State, Local, School District Taxes Paid
- Other Interest Paid
- Child Care Expenses & Provider Information (ID# and address)
- Unreimbursed Employment-Related Expenses
- Job-Related Educational Expenses