

Tax Time Check List

Please include address, phone number and Email.

- 1.Any W-2s or 1099s
- 2.Distributions from an IRA (1099-R), Social Security (1099-SSA), or Pensions (1099-R)
- 3.Any Contributions to an IRA or SEP
- 4.HSA Contributions
- 5.Mortgage Interest
- 6.Mortgage Insurance Premiums
- 7.Property Taxes
- 8.Medical expenses are deductible as listed in our “Eligible Medical Expenses Blog”
- 9.Copy of 1095 A, B or C (Insurance coverage forms)
- 10.Charitable donations. \$250.00 or more, we need receipts.
- 11.Drivers license or state ID to help battle fraud.**
- 12.Education Costs for teachers
- 13.Student Tuition – 1098-T we need separation of tuition and room and board.The 1098-T is available on line thru your university.**
- 14.Student loan interest
- 15.Excise tax on vehicles (a copy of the registration works for this)
- 16.Child & Dependent Care Expense (this includes name & address of childcare provider as well as amount paid.)
- 17.Private School.** Please let us know the amount paid in tuition **each year.**
- 18.Homeschool.** * Let us know as deductions may be available for K-12.

Rental Properties

- 1.Rental property addresses
- 2.Rental property income and expenses
- 3.Mortgage interest for rental properties
- 4.Property taxes for rental properties
- 5.Costs of renovations (if any)

If you rent

Name and address of Landlord

Total paid in rent of amount per month and number of months.

Investment Income

Year end brokerage statements which include:

1099-B, 1099 INT, and 1099-DIV on stock sales, Interest and Dividend income.

If you have a Land Contract please provide Principal and interest received.