**WHAT TO PROVIDE TO YOUR TAX PREPARER TO**

**COMPLETE YOUR PERSONAL RETURN**

**Personal Data**

* Prior Year Tax Returns (if not prepared by In The Black)
* Social Security Numbers (including spouse and children)
* Child care provider tax I.D. or Social Security Number and Address (including camps and baby sitters.)

**Employment & Income Data**

* W-2 forms for this year
* Partnership and trust income K-1 forms
* Pensions and annuities 1099-R
* Alimony received
* Jury duty pay
* Gambling and lottery winnings W-2G and losses.
* Prizes and awards
* Scholarships and fellowships
* State and local income tax refund 1099-G
* Sale of property 1099-S
* Cancellation of debt 1099-C
* Proceeds from life insurance

**Homeowner/Renter Data**

* Residential address(es) for this year
* Mortgage interest: Form 1098
* Sale of your home or other real estate: Form 1099-S
* HUD settlement statements from Sale and Purchase of new and old property.
* Second mortgage interest paid
* Real estate taxes paid
* Rent paid during tax year name of landlord
* Moving expenses

**Financial Assets**

* Interest income statements: Form 1099-INT & 1099-OID
* Dividend income statements: Form 1099-DIV
* Proceeds from broker transactions: Form 1099-B
* Cost of the stocks sold in the year from your broker statements
* Tax Refunds & unemployment compensation: Form 1099-G
* Miscellaneous income including rent: Form 1099-MISC
* Retirement plan distribution: Form 1099-R

**Financial Liabilities**

* Auto loans and leases (invoice with car value and lease or finance payments ) if vehicle used for business
* Student loan interest paid
* Early withdrawal penalties on CDs and other time deposits

**Automobiles, Boats, Snowmobiles, Trailers etc.**

* Personal property tax information (Registrations)

**Expenses**

* Gifts to charity (receipts for any single donations of $250 or more) and separate total for non-cash donations
* Unreimbursed expenses related to volunteer work
* Unreimbursed expenses related to your job (travel expenses, entertainment, uniforms, union dues, subscriptions, Mileage to second job or Multiple work sites))
* Investment expenses
* Job-hunting expenses
* Education expenses
* Child care expenses
* Medical Savings Accounts
* Adoption expenses
* Alimony paid
* Tax return preparation expenses and fees

**Self-employment Data**

* K-1s on all partnerships
* Receipts or documentation for business-related expenses (use our organizer to summarize expenses by categories).
* Farm income

**Deduction Documents**

* State & local income tax and your estimated tax paid
* IRA, Keogh & other retirement plan contributions
* Medical expenses
* Casualty or theft losses
* Other miscellaneous deductions
* HSA contributions/deductions

**Miscellaneous Items**

* Current 401k most recent statement
* Old 401k most recent statement
* Year-end brokerage statement
* Cost basis of stocks/bonds/mutual funds sold
* Life insurance statement
* Voided check