# Morganton Tax Service

| Tax Documentation Checklist | | | | |
|---|---|---|---|---|
| Use the checklist below to assist in gathering the documents, forms, and records needed to complete your income tax return. Every item below may not apply to you and the list is not all inclusive. | | | | |
| Purpose | Form Name | Description | Check if Provided | # Provided |
| **General** | | Driver's License | | |
| | | Social Security Cards | | |
| | | Prior Year Return | | |
| | | Prior Year Adjusted Gross Income (AGI) | | |
| **Income** | W-2 | Wages, Salaries, Tips | | |
| | 1099-INT | Interest Income | | |
| | 1099-DIV | Dividend Income | | |
| | 1099-R | Retirement Income | | |
| | SSA-1099 | Social Security/Disability Income | | |
| | 1099-G | Unemployment Income | | |
| | 1099-G | State Tax Refunds | | |
| | 1099-B | Capital Gains (Stock/Land) | | |
| | 1099-S | Real Estate Sales | | |
| | 1099-MISC | Miscellaneous Income | | |
| | 1099-NEC | Nonemployment Compensation | | |
| | | Alimony Received | | |
| | | Income from Rentals, Farm and/or Business | | |
| | K-1 | Partnerships/Trust/S-Corp | | |
| **Tax Credits** | | Child Tax Credit | | |
| | | Child & Dependent Care Credit | | |
| | EITC | Earned Income Tax Credit | | |
| | | First Time Home Buyer Tax Credit | | |
| **MISC** | 1098-E | Student Loan Interest | | |
| | 1098-T | Tuition paid | | |
| | 1098 | Mortgage Interest | | |
| | 1095-A | Marketplace Insurance | | |
| | | IRA ,SEP, SIMPLE, or Pension Contributions | | |
| | | Alimony Paid | | |

| Purpose | Form Name | Description | Check if Provided | # Provided |
|---|---|---|---|---|
| Taxes | | State/Local taxes Paid | | |
| | | Real Estate taxes | | |
| | | Personal Property taxes | | |
| Itemization Items (if applicable) | | Child Care Costs Receipts/Pymts | | |
| | | Education Cost Receipts/Pymts | | |
| | | Adoption Cost Receipts/Pymts | | |
| | | Charitable Donation Receipts | | |
| | | Medical/Dental Receipts | | |
| | | Prescription Medicine Receipts | | |
| | | HAS, FSA Contributions | | |
| | | Casualty & Theft Losses | | |
| | | Tax Deductible Miles Traveled | | |
| | | Home Business Expense Receipts | | |
| | | Energy Efficient Home Tax Credit | | |
| | | Rental Property expenses | | |

I hereby acknowledge that the above items noted are what I have provided to Morganton Tax for the sole purpose of preparing my tax return.


Signature: _____        Date:_____