

KEMP HARVEST TAX SERVICES

SAMPLE OF TAX DOCUMENTS NEEDED TO PREPARE AN ACCURATE RETURN

The Starting Point:

- Last 2 years' tax returns (if not prepared by our office)
- Full Names, Social Security numbers and birthdates for children and other dependents

Income Documents:

- All W-2s from employers
- End of year paystub (includes items such as union dues and charity that are not included on a W-2)
- Any statements for miscellaneous income from odd jobs, contracts, etc. (Form 1099-MISC)
- All interest statements from banks (Form 1099-INT)
- Dividend statements from investment companies (Form 1099-DIV)
- Statements of any unemployment insurance received (Form 1099-G)
- Statements of your last year's state tax refund if you received one (Form 1099-G)
- Any Schedule K-1 received from a partnership, an estate, or S-corporation
- Statements of distributions from retirement funds (Form 1099-R)
- Alimony amounts received/paid
- Social Security statements (Form SSA-1099)
- Transaction statements for stocks/bonds you sold during the year (Form 1099-B)
 - The purchase price and date of purchase for any stocks you sold during the year
- Information about any other income you received during the year

Rental or Business Records- If you operate a small business or rental properties:

- An income and expenses (profit & loss) statement with all expenses categorized
- A list of all business assets including cost and date purchased
- A written record of miles driven for business
- Amount paid for health insurance premiums
- If you have an office in your home
 - Square-footage of your home and square-footage of your office
 - Amounts paid for home utilities, insurance, repairs, and improvements
 - Purchase date and cost of your home

Deductions:

- Mortgage interest statement (Form 1098)
- Real estate taxes paid
- Mortgage points paid on a new home, paid by the seller, or on a refinance
- The amount you paid for state taxes last year (if you owed state taxes last year)
- Amount of interest paid on student loans
- Record of contributions to any IRA, college savings plan, or Health Savings Account
- Moving expenses if the move was job-related and more than 50 miles
- Alimony paid
- Medical expenses - insurance, physicians, hospitals, prescriptions, co-pays, eye exams/glasses
 - Home improvements done for medical reasons
 - Mileage driven for medical appointments
 - Nursing home expenses where medical treatment is main reason for living at that home
- Cash contributions to churches and qualified nonprofit organizations
 - A list, with the fair market value, of items donated to nonprofit organizations
 - Mileage driven for charitable purposes, i.e. driving for church camp
- Job related expenses you were not reimbursed for, such as travel, supplies, education, tools, uniforms, dues, etc.
- Job hunting expenses such as resumes, travel, phone charges, and employment agency fees.
- Expenses for safe deposit boxes, IRA management fees, investment advice, investment-related publications, and education

Other Items:

- Closing papers for real estate you bought, sold, or refinanced during the year (Form HUD-1, 1099-S)
- Name, address, and Tax Identification Number (EIN or SSN) for child care providers along with amount paid
- Amounts paid for college tuition for yourself or your dependents (Form 1098-T)
- Proof of health insurance, per the Affordable Care Act (Form 1095-A, 1095-B or 1095-C)
- Cancellation of debt (Form 1099-C)