



# ACCOUNTING CORP.

## The Basics

- Last year's tax return and amount paid for preparing the tax return (If we prepared your tax return last year, we already have that information for you)
- Social Security Numbers and birth dates for everyone on your tax return (you, your spouse, children and other dependents)
- Amount of state and local income tax you paid in the previous year

## Forms

- All forms that say W-2, 1098, 1099, or Schedule K-1
- All forms providing proof of health insurance coverage
- Records of any contributions you made to IRAs or other retirement plans
- Records for what you paid in mortgage interest, real estate tax, and personal property tax
- Closing documents (such as HUD statement) for a home you purchased in the previous year

## Income and Investments

- Income & expense records for work you performed (not already shown on a W-2 or 1099)
- Records of other income and expenses (rental income and expenses, jury duty, gambling, hobby, alimony income, etc.)
- The date you purchased and your total investment in any stocks or any other property you sold
- Expenses related to your investments

## Charitable Donations

- Amounts donated to houses of worship, schools, or other charitable organizations
- Records of non-cash charitable donations
- Number of miles you drove for charitable purposes

## Deductions and Expenses

- Number of miles you drove for medical purposes and amounts paid for health care (insurance, doctors, dentists, hospitals, etc.)
- Records for childcare and higher education costs
- Employment-related expenses (dues, travel, publications, tools, uniforms, uniform cleaning, etc.)
- Job search expenses and unemployment income, if applicable
- Records for HSA contributions, alimony paid, moving expenses, and student loan interest

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