

2017 Tax-Related Forms and Documentation

January is right around the corner, and you may be wondering what forms your preparer will need to complete your tax returns. Below is a list of documents you can expect, along with their anticipated delivery dates. After the end of the year, you may also receive letters from charities confirming your 2017 donations. Keep these with all of your other tax information.

| If you had... | You'll receive Form... | Around... |
|--|------------------------|-------------|
| Wages from a job | W-2 | January 31 |
| Unemployment income | 1099-G | January 31 |
| Social Security income | 1099-SSA | January 31 |
| Interest from bank accounts | 1099-INT | January 31 |
| Dividends from stock you own | 1099-DIV | January 31 |
| Rental Income | 1099-MISC | February 15 |
| Income or loss from selling stock | 1099-B | February 15 |
| A sale of your home | 1099-S | February 15 |
| A distribution from a retirement account | 1099-R | January 31 |
| Income from a partnership or S corporation | Schedule K-1 | March 15 |
| Income from an estate | Schedule K-1 | April 18 |
| Cancellation of debt | 1099-C | January 31 |
| An HSA | 1099-SA | January 31 |
| Student loan payments | 1098-E | January 31 |
| Mortgage payments | 1098 | January 31 |
| Tuition expenses | 1098-T | January 31 |
| Distributions from tuition plans | 1099-Q | January 31 |
| Health insurance from the marketplace | 1095-A | January 31 |
| Health insurance through a job | 1095-B or 1095-C | January 31 |



Important Tax Dates & Information

If you were affected by Hurricanes Harvey, Irma, or Maria and extended your taxes, they are due on January 31, 2018. You also have until January 31, 2018, to pay estimated taxes that were originally due on September 15, 2017, and January 15, 2018.

If you were affected by the wildfires in northern California, you have until January 31, 2018, to file individual tax returns on extension. You also have until January 31, 2018, to pay estimated taxes that were originally due on January 15, 2018.

For more information, contact me or visit the "Tax Relief in Disaster Situations" webpage on www.irs.gov.

Did You Know?

In the 2016 filing season, the IRS processed over 150 million individual income tax returns, with a total income tax after credits of \$1,416,834,888.

Quote Corner

"It's chaos. Be kind."

~Michelle E. McNamara