



**Circle all that apply to you and/or your spouse:**

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**Employment & Income Data**

W-2 forms for the year  
Unemployment Income (Form 1099-G)  
Miscellaneous Income including rent (Form 1099-MISC)  
Partnership, S Corp, & Trust Income (Sch K-1)  
Pensions & Annuities (Form 1099-R)  
Social Security/RR1 Benefits (1099-SS or RRB-1099)  
Gambling & Lottery winnings (1099-G or W-2G)  
Scholarships & Fellowships  
State income tax refunds (Form 1099-G)  
Alimony received est before 1/1/19  
Jury Duty Pay  
Prizes & Rewards  
Interest Income (1099-INT)  
Dividend Income (1099-DIV)  
Proceeds from Broker Transactions (Form 1099-B)  
Any other income documents

**Self Employment Data**

Business income (Form 1099-MISC and/or records)  
Partnership SE income: Sch K-1  
Business expenses: Receipts, documents & records  
Farm expenses: Receipts, documents & records  
Employment taxes & other business taxes paid for current year  
Auto loans & leases

**Receipts or listings of itemized expenses**

Out of pocket medical expenses/mileage  
Gifts to Charity: cash & non-cash  
Unreimbursed expenses related to Volunteer work  
Unreimbursed expenses to job: Dues, uniform, etc. for M  
Investment Expenses  
Job hunting expenses  
Job related education expenses  
Vehicle license tabs  
Property tax statement/paid  
Property tax refund paperwork  
Mortgage interest paid  
Tax preparation fees  
Records for casualty or theft losses (police department)

**1099-K (if you collected more than \$600)**

**Other deductions**

Student Loan Interest Paid  
Tuition payments  
Daycare paid (Form W-10)  
Alimony Paid-Including SSN of recipient est before 1/1/1  
Rent paid (Form CRP)  
Receipts for K-12 school supplies  
Federal and/or state estimated tax paid for current year

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**Do you have documentation that proves the fore mentioned?**