

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

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

Do you have documentation that proves the fore mentioned?