

General Documents Checklist as a reminder of things needed before filing taxes.

- o Wage statements/W-2s
- o Drivers license(s)
- o Social Security card(s)
- o Dependents Social Security numbers and dates of birth
- o Last years Federal and State tax return
- o Child care expenses and provider information
- o State or local taxes paid
- o Unemployment income/1099-G
- o Unreimbursed employment-related expenses
- o Self-employed business income and expenses statement /1099-MISC
- o Medical and dental expenses
- o Alimony paid or received
- o Mortgage or home equity loan interest paid/1098
- o Real estate and personal property taxes
- o Student loan interest/1098-E
- o Commissions Received/Paid
- o Casualty or theft losses
- o Lottery or gambling winning /losses
- o Pension, retirement income/1099-R
- o Canceled Debt Amount statement
- o Social Security income/SSA-1099
- o IRA Contributions
- o Statements on the sales of stocks or bonds
- o Interest and dividend income/1099-INT/1099-Div
- o State refund Amount /1099-G
- o Income and Expenses From Rentals
- o Estimated Taxes or Foreign Taxes Paid
- o HUD-1 Statement or Substitute if new home Purchased
- o Cash and non-cash charitable donations
- o Record of Purchase or sale of residence
- o Job- related educational expenses
- o Educator Expenses
- o Tuition and Education Fees/1098-T