

The following is a checklist of items that you should look for and have on hand when filing your tax return this year:

- W-2 from employers
- 1099's of Miscellaneous Income
- 1099 for Interest earnings (1099 INT, 1099-OID, 1099-DIV)
- Mortgage Statement, Interest Paid, and Real Estate Taxes (Form 1098E and other 1098 series forms)
- Statements from Stock or Mutual Fund Sales and Purchases
- IRA Statements, Contributions and Withdrawals (Form 5498, Form 5498-SA, all other 5498 series forms)
- 401(k) or Employer Sponsored Retirement Plan Statements
- Tuition Payments (1098 T)
- Dependent Care Expenses
- Medical Expenses
- Charitable Contributions
- Employee Business Expenses
- Business Income and Expenses
- Dependents Information
- IRS IP Pin
- Banking Information
- 1095-A Health Insurance through the Marketplace
- Spouses Information
- Unemployment 1099-G
- Schedule K-1
- Record of Estimated Tax Payment
- Rent Asset Information
- SSA-1099 Social Security Income
- Gambling Income W-2G
- State Tax Refund
- Other