



## ***Important Document Checklist***

### ***Personal Information***

- Driver's License
- Proof of Child Dependency (Document with Child's Name and Mailing Address That Matches Person Claiming the Dependency Deduction, i.e. School Records, Medical Bill)
- Signed Form 8332 - Release/Revocation of Release of Claim to Exemption for Child by Custodial Parent

### ***Itemized Deductions***

#### ***Listing of Medical Expenses Paid That Were Not Reimbursed By Insurance or Employer***

- Doctors & Hospital
- Dental (Annual Checkup, Dentures, Braces, Cleaning or Other)
- Prescriptions
- Insurance (Health & Long-Term Care)
- Eye Glasses (Glasses, Contacts or Exams)
- Total Medical Miles Driven

### ***Taxes Paid***

- Estimated Taxes Paid To Federal and/or State
- Real Estate Taxes
- Auto, Motorcycle, RV, Boat & Trailer Excise Taxes

### ***Interest Paid***

- Mortgage Interest on Principal Residence, Vacation Home, RV (Form 1098)
- Mortgage PMI Insurance (On Form 1098)

### ***Charitable Contributions***

- Cash (Provide Listing or Receipts)
- Non-Cash (Receiving Organization, Provide Listing of Items, Date Contributed, Original Cost and Amount of Deduction)
- Total Charitable Miles Driven

### ***Miscellaneous Deductions***

- Gambling Losses including Travel and Lodging

### ***Income Documents***

- Forms W-2
- Forms 1099INT (Interest Income)
- Forms 1099DIV (Dividend Income)
- Forms 1099B (Sale of Investments, Sale of Stocks and/or Bonds)
- Forms 1099R (Pension Income)
- Forms SSA1099 (Social Security Benefits)
- Forms 1099G (Unemployment Compensation and State/Local Refund/Credits)
- W2G (Gambling Winnings)
- Forms 1099MISC (Self-Employment Income and Commissions)
- Form 1099C (Cancellation of Debt)
- Form K-1 (Income from Partnership, S-Corp, Estates, Joint or Trust)
- Rental Income (Provide List of Expenses)
- Schedule C (Business Income and Expenses)
- Business Auto Mileage (Log Book)
- Schedule F (Farm Income and Expenses)
- Jury Duty Pay (Provide Check Stub or Receipt)
- Unreported Tips
- Sick Pay
- Alimony Paid and/or Received
- Health Insurance Form 1095A, B or C

#### ***If you **SOLD** a House the Following Information Is Needed:***

- Closing Statement from Sale of House
- Closing Statement from Purchase Of Old Home
- List of improvements With Cost of Home That Was Sold

### ***Deductions and Credits***

- Moving Expenses (Military Only)
- Educator Expenses
- IRA Statement (Withdrawal and/or Contributions)
- College Tuition Expense and Year in College (Form 1098T) with Statement of Account from School
- Student Loan Interest (Form 1098E)
- Child Care Expenses (Provide Information)
- Adoption Expense (Provide Information)