

A list of common documents needed for tax preparation:

Your Tax Situation

Please select all that apply to you or your spouse:

Income Sources

- Employer (W-2)
- Unemployment
- Social Security (SSA-1099)
- Retirement plan distribution
- Interest (1099-Int)
- Dividends (1099-Div)
- Stock or mutual fund sale (1099-B)
- Self-employment / miscellaneous income
- Expenses from self-employment
- Rental property

Itemizations

- Donated cash or goods to a charity
- Made a major taxable purchase
- Had a mortgage payment (1098)
- Paid property taxes
- Large out-of-pocket medical expenses

Household / Dependents

- Changed family or marital status
- Adopted a child
- Paid child / dependent care expenses
- Tuition (1098-T) and education expenses
- Paid student loan interest
- Enrolled in a health insurance plan through the federal or state marketplace (1095-A)
- HSA contribution

Miscellaneous

- Sold a home
- Paid / received alimony
- Lived in a federally declared disaster area
- Had gambling winning / losses
- Made an IRA contribution
- Had foreign income / assets / accounts
- Received an IRS-issued PIN number
- Received, sold, exchanged, disposed, or other involvement in virtual currency

PIN #