

Income & Tax Information

W-2's
Interest (1099-INT or substitute)
Dividend Slips (1099-DIV or substitute)
Stock Sales (1099-B or Broker Statement)
Self-Employment Income and Expenses
Sale of a Personal Residence
Rental Income and Expenses
Sale of any Business Assets
Gambling or Lottery Winnings (W-2G for some winnings)
State Income Tax Refund (1099-G)
Pension Income (1099-R)
Estimated Taxes Paid
Social Security or Railroad Retirement (SSA-1099 or RRB-1099)
IRA or 401(k) Distribution (1099-R)
Unemployment Compensation (1099-G)
Interest (1099-INT or substitute)
Miscellaneous Income (1099-MISC)

Deductions/Adjustments

Medical Expenses
Real Estate or Personal Property Taxes
Mortgage Interest
Charitable Contributions
Employee Business Expenses
Gambling Losses
Moving Expenses
Traditional IRA Contributions
Higher Education Expenses
Educator Expenses
Student Loan Interest
Energy Credits
Alimony Paid

Tax Credits

Child Care Provider/Address and Employer Identification Number (EIN) or Social Security Number (SSN)
Adoption Expenses
Retirement Savings Contributions Credit