

What documents you need to support your Income Tax Filing

Use this checklist to organize your tax records

Taxpayers Basic Personal Information

- Bank Information and Routing number
- Identity Theft PIN (If applicable)
- Last Year's Return
- Name, SSN or ITIN, and date of birth

Dependents Information

- Custodial releasing child claim right to noncustodial parent - **Form 8332**
- Name, SSN or ITIN, and date of birth for each child/dependent

Source of Income Documents

- Wages - **Form W-2** for you and your spouse
- Unemployment Compensation - **Form 1099-G**
- Cancellation of Debt - **Form 1099-C**
- Gambling Income- **Form W-2G** and Records of Gambling Losses
- Health Saving Account - **Form 1099-SA**
- Hobby Income/Expenses
- Installment Sale Information
- Interest , Dividend Income - **Forms 1099-INT, 1099-OID, 1099-DIV**
- IRA Contribution for the year - **Form 5498**
- Jury Duty Income
- Long Term Care Reimbursement - **Form 1099-LTC**
- Pension/IRA/Annuity Income - **Form 1099-R**
- Prizes and Awards
- Rail Road Income RRB - **Form RRB -1099**
- Royalty Income - **Form 1099-MISC.**
- Sale of Stock or property - **Form 1099-B. Form 1099-S**
- Social Security - **Form 1099-SSA**
- Trusts Income
- Business - All reportable payment transactions - **Form 1099-K**
- Business - Credit Card statements
- Business - Dates of acquisitions and dispositions
- Business - Miscellaneous Income - **Form 1099-MISC.**
- Business - Records of Income/Expenses/Home size
- Business - Records of your cost basis in acquired/sold property
- Business - Schedule **K-1s** Partnership, S Corporation, Estate Trust Income
- Rental - Records of Income and Expenses
- Rental - Suspended Rental Loss Information

- Rental - Asset information [cost/date of service/depreciation]
- Adjustments to Income and Credits**
- Adoption Costs - SSN for Child/Legal Records/Med & Transportation costs
- Alimony Paid
- Charitable Donations - Receipts/Charity Letters/Items donated/Mileage
- Child care costs - provider's name/address/tax ID/amount paid
- Estimated Tax payments - **Form 1040ES**
- Foreign Bank Account greater than \$10,000 USD
- Higher Education Tuition Paid - **Form 1098-T**
- Home Equity Line of Credit - evidence to support the amount used
- Keogh, Sep, SIMPLE, and other Self-Employed pension plans
- Medical and dental expense records
- Mortgage Interest Statement - **Form 1098**
- Out of pocket education expenses - canceled checks or receipts
- Records of Health Insurance - **Form 1095-A, 1095-B, 1095-C**
- Records of Medical Saving Account Contributions - **Form 5498-SA**
- Self-Employed Health Insurance payment records
- Student Loan Interest paid - **Form 1098-E**
- Taxes paid - Real Estate/Personal Property Taxes/Vehicle License fees

Reminder - 2019 taxes are due Wednesday April 15, 2020