

# DOCUMENTS NEEDED TO FILE YOUR TAX RETURN



## PERSONAL DATA

- Social Security Numbers (including spouse and children)
- Child care provider tax I.D. or Social Security Number

## EMPLOYMENT & INCOME DATA

- W-2 forms for this year
- Tax refunds and unemployment compensation: Form 1099-G
- Miscellaneous income including rent: Form 1099-MISC
- Partnership and trust income
- Pensions and annuities
- Alimony received
- Jury duty pay
- Gambling and lottery winnings
- Prizes and awards
- Scholarships and fellowships
- State and local income tax refunds
- Unemployment compensation

## HEALTH INSURANCE INFO (New for 2015)

- All 1095-A Forms from marketplace providers (if you purchased insurance through a Marketplace)
- Existing plan information (policy numbers, etc.)
- If claiming an exemption, your unique Exemption Certificate Number
- Records of credits and/or advance payments received from the Premium Tax Credit (if claiming)

## HOMEOWNER/RENTER DATA

- Residential address(es) for this year
- Mortgage interest: Form 1098
- Sale of your home or other real estate: Form 1099-S
- Second mortgage interest paid
- Real estate taxes paid
- Rent paid during tax year
- Moving expenses

## FINANCIAL ASSETS

- Interest income statements: Form 1099-INT & 1099-OID
- Dividend income statements: Form 1099-DIV
- Proceeds from broker transactions: Form 1099-B
- Retirement plan distribution: Form 1099-R
- Capital gains or losses

## FINANCIAL LIABILITIES

- Auto loans and leases (account numbers and car value) if vehicle used for business
- Student loan interest paid
- Early withdrawal penalties on CDs and other fixed time deposits

## AUTOMOBILES

- Personal property tax information
- Department of Motor Vehicles fees

## EXPENSES

- Gifts to charity (receipts for any single donations of \$250 or more)
- Unreimbursed expenses related to volunteer work
- Unreimbursed expenses related to your job (travel expenses, entertainment, uniforms, union dues, subscriptions)
- Investment expenses
- Job-hunting expenses
- Education expenses (tuition and fees)
- Child care expenses
- Medical Savings Accounts
- Adoption expenses
- Alimony paid
- Tax return preparation expenses and fees

## SELF-EMPLOYMENT DATA

- Estimated tax vouchers for the current year
- Self-employment tax
- Self-employment SEP plans
- Self-employed health insurance
- K-1s on all partnerships
- Receipts or documentation for business-related expenses
- Farm income

## DEDUCTION DOCUMENTS

- State and local income taxes
- IRA, Keogh and other retirement plan contributions
- Medical expenses
- Casualty or theft losses
- Other miscellaneous deductions

*\*This list is NOT comprehensive. Call our office to see what other documents might apply to your situation.*