

Below is a list of items in which documentation needs to be provided to complete your tax return if applicable. Please review the list as a helpful reminder:

**SOURCES OF INCOME:**

- Alimony Received (If divorced before 12/31/2018)
- Dividends (1099-DIV)
- Credit Card /Payment Company Income (i.e. PayPal, Venmo, 1099-K)
- Farming (P&L Statements, Balance Sheets)
- Gambling (Win/Loss Statements, (Form W-2 G)
- Interest Income (1099-INT)
- Miscellaneous Income (1099-MISC)
- Non-Employee Compensation (1099-NEC)
- Partnerships and S Corporation (K-1)
- Rental Income (Include list of improvements and related costs)
- Royalties
- Self-Employment Income (P&L Statements, Balance Sheets)
- Social Security Benefits
- Stocks/Asset Sales (1099-B, acquisition/cost basis)
- Unemployment Income
- Wages (W-2)

**CREDITS/EXPENSES:**

- 529 Contributions
- Charitable Contributions
- College Tuition (1098-T)
- Crypto/Virtual (Bitcoin) Currency Transactions
- Daycare Expenses
- Debt Cancellation
- Distribution from retirement accounts (1099-R)
- Electric Vehicle Purchase (8936)
- Energy Saving Home Improvements
- Federal, State and Municipal Estimated Tax Payments Made
- Federal, State and Municipal Income Tax Refunds Received
- HAS Contributions (5498 SA) or Distributions
- Health Insurance Through The Marketplace (1095-A)
- Home Purchase (HUD/Settlement Statement)
- Home Sale (1099-S)
- IRA Contributions
- Medical Expenses (If > 7.5% of Adjusted Gross Income)
- PMI
- Real Estate Taxes Paid
- Student Loan Interest (1098-E)