

INCOME:

W-2's

- 1099-R, 1099-INT, 1099-DIV, etc.
- 1099s from investments
- Social Security
- Unemployment, state or local tax refund (1099-G)
- Gambling income (as well as expense records)
- Amount of any alimony received and ex-spouse's name
- Health care reimbursements (1099-SA or 1099-LTC)
- Prizes and awards
- Sales of stock, property, or other assets (include loss carryovers)
- Other 1099s
- Any other income
- Self employed income and expenses including rental income and expenses

EXPENSES:

- Forms 1098 or other mortgage statements
- Real estate and personal property tax records
- HUD statement showing closing date of home purchase
- Receipts for charity
- Receipts of non-cash charitable donations
- Healthcare costs
- Health Insurance information
- Form 1095-A, 1095-B, and 1095-C for health insurance
- Amounts of miles driven for charitable or medical purposes
- Amount paid for preparation of last year's tax return
- Employment-related expenses
- Job-hunting expenses
- Education expenses (1098-T)
- Daycare expenses w/caregiver info
- Record of alimony paid
- Record of estimated tax paid
- Any other documentation related to deductions or credits
- Vehicle related expenses for work or business
- Repayment of 2008 first time homebuyer credit

List any tax questions that you have for your preparer.
