

Tax Documents to Include

Income

- **Forms W-2** (Wages)
- **1099-INT** (Interest Income)
- **1099-DIV** (Dividend Income)
- **1099-B** and **1099-S** (Sale of Stocks, Securities, Crypto and other Investment Property)
- **1099-G** (Unemployment Compensation)
- **1099-K** (Payment from apps, such as Venmo or Cash App, in excess of \$600)
- **1099-R** (Retirement Income - Pension, IRA, and Annuity Distributions)
- **1099-S** (Sale of real estate)
- **1099-MISC** (Miscellaneous Income)
- **SSA-1099** (Social Security Benefit Statement)
- **1099-SA** (Distribution from a Health Savings Account (HSA) or Medical Savings Account (MSA))
- **1099-A** and **1099-C** (Foreclosures, Short Sales, or Cancellation of Debt)
- **Forms K-1** (Partnerships, Trusts, S-Corporations)
- **Forms W-2G** (Gambling Income)
- **Brokerage Statements:** Including the Statement of Realized Gains & Losses for sales in 2023.
- **State Income Tax Refund** and **State Property Tax Refund** Statements

Expenses

- **Traditional, Roth, and Education IRA Contributions**
- **Form 1098-T** (College Tuition Statement for you or dependents)
- **Forms 1098-E Student Loan Interest Paid**
- **Health Savings Account (HSA) or Medical Savings Account (MSA)** contributions
- **Energy Credit**

Itemized Deductions

- **Medical Expenses** (if significant) and any **Health Insurance/ Long-Term Care Insurance Premiums** paid.
- **Form 1095-A** (Qualified Health Insurance purchased through an exchange)
- **Property Tax Statements** (Real Estate Taxes paid in 2023 and 2024 if available)
- **Settlement Statements** for a home sale, refinance, or 2nd mortgage.
- **Vehicle License Tab** payments
- **Form 1098** (Mortgage Interest Statement)
- **Charitable Contribution Receipts** (receipt for every contribution, regardless of amount)
- **Description of Non-Cash Contributions** for each gift when the total for the year is greater than \$500.
- **Investment Interest Expense**
- **Gambling Expenses** to the extent of Gambling Income

Miscellaneous

- **Childcare Expenses** and provider information
- **Tax Notices** received from the IRS or other taxing authority.
- **Adoption Expenses**
- **Alimony** paid or received under a pre-2019 agreement.
- **Rental Property/ Business** Income and Expenses
- **Contributions to a 529 Savings Plan** (Account Number, Brokerage Company, Amount)
- **Closing Disclosure Documents** for any Real Estate transactions
- **Foreign Banking or Investment Account**
- **Identity Verification Pin from the IRS** If applicable
- **Home Energy Credit:** www.irs.gov/credits-deductions/home-energy-tax-credits
- **Credit for new clean Vehicles:** www.irs.gov/credits-deductions/credits-for-new-clean-vehicles-purchased-in-2023-or-after
- **Any other items** that may have a possible tax impact.