

## Income

W-2 Forms

Social Security Income - SSA-1099

Unemployment Income - 1099-G

Interest Income 1099-INT

Dividend Income 1099-DIV

Sales of Stocks & Bonds 1099-B

Miscellaneous Income 1099-MISC

Retirement Income 1099-R

Income from Partnerships, Estates, Trusts and S-Corps form K-1

Income and Expense from Rental Property

Lottery or Gambling Winnings W-2G

Alimony Paid or Received

## Expenses

Mortgage Interest Paid form 1098

Sale of Residence

Real Estate Taxes

Personal Property Taxes

Charitable Contributions

Medical Expense

Unreimbursed Employee Business Expense

Tuition and Education Expenses

Student Loan Interest - Form 1098E

Child Care Expenses - Providers Federal ID Number

IRA Contributions

Investment Expenses

This list is not all-inclusive. If in doubt of whether a document is tax-related, please bring it with you.