



## **Personal Data**

- Social Security Numbers and Dates of Birth
- Childcare provider tax I.D/ SSN and address

## **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, trust, and S-Corporation income: Form K-1
- Pensions, annuities, retirement or profit-sharing plans, IRA's etc.: Form 1099-R
- Alimony received (including payer's SSN) if divorce finalized prior to 1/1/2019
- Jury duty pay
- Gambling and lottery winnings: Form W-2G (and a list of gambling losses if any).
- Prizes and awards
- Scholarships and fellowships
- Social Security income: Form SSA-1099
- Transfer of stock options exercised: Form 3922
- Amount of PRP Stimulus received March 2021- \$1,400/person
- Letter 6419 if you received advanced childcare tax credit payments (2 letters if married filing jointly).
- Letter 6475 if you received the third economic impact payment in January 2021.

## **Health Insurance**

- All 1095-A Forms from marketplace providers (if you purchased insurance through a Marketplace).
- Records of credit 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 and second mortgage interest paid.
- Sale of your home or other real estate.
- Real estate taxes paid.
- Rent paid during tax year.
- Settlement statement for any real estate purchased, sold, or refinanced during the year.

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## **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
- Consolidated form 1099-Brokerage statements

## **Financial Liabilities**

- Auto loans and leases (account numbers and car value) if vehicle used for business
- Student loan interest paid: Form 1098-E
- Early withdrawal penalties on CDs and other fixed time deposits

## **Automobiles**

- Personal property tax information
- Department of Motor Vehicles fees (only if including sales or property tax)
- Sales tax on purchase

## **Expenses**

- Gifts to charity (receipts for any single donations of \$250 or more, and non-cash donations of \$500 or more)
- Unreimbursed expenses and mileage related to volunteer work
- Childcare expenses
- Medical Savings Accounts and Health Savings accounts: Form 1099-SA
- Adoption expenses
- Alimony paid (including payee's SSN) if divorce finalized prior to 1/1/2019
- Contributions to 529 plans.
- Health insurance premiums (If not paid through employer).
- Education Expenses (tuition and fees)

## **Self-Employment Data**

- Estimated tax vouchers for the current year
- Self-employment income
- Self-employment SEP plans, Simple IRA
- Self-employed health insurance (do not include COBRA) K-1s on all partnerships
- Receipts or documentation for business-related expenses, Farm income and expenses.
- Rent income and expenses
- Number of days you were unable to work due to COVID-19 or due to symptoms of COVID-19, including

time while waiting for test results (due not include days reimbursed by an employer).

- Number of days you were unable to work due to caring for a family member who was quarantined due to COVID-19 or caring for a child due to the closure of a childcare facility/school.

## **Deduction Documents**

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

## **Credits**

- Energy improvements
- Education expenses (tuition and fees) Form 1098-T
- Adoption expense
- Electric vehicle purchase