**Are you ready for Tax Season? Gather the following information, stay organized, and save time and money this year! By staying organized, we can file your return faster, and you will avoid additional tax preparation fees.**

**Personal Information**

* Your social security number or tax ID number
* Your spouse's full name and social security number or tax ID number
* Amount of any alimony paid and ex-spouse's full name and social security number
* Your tax returns for the previous 2 years

**Information About Other People Who May Belong on Your Return (Dependents)**

* Dates of birth and social security numbers or tax ID numbers
* Childcare records (including the provider's tax ID number) if applicable
* Income of other adults in your home
* Form 8332 showing that the child’s custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

**Education Payments**

* Forms 1098-T from educational institutions
* Receipts that itemize qualified educational expenses
* Records of any scholarships or fellowships you receivedForm1098-E if you paid student loan interest

**Employee Information**

* Forms W-2

**Self-Employment Information**

* Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
* Records of all expenses — check registers or credit card statements, and receipts
* Business-use asset information (cost, date placed in service, etc.) for depreciation
* Office in home information, if applicable

**Business Use of Vehicle Information**

* Log showing total miles driven for the year (or beginning/ending odometer readings), total business miles driven for the year (other than commuting), and the business purpose of the mileage
* Amount of parking and tolls paid
* If you want to claim actual expenses, receipts or totals for gas, oil, car washes, licenses, personal property tax, lease or interest expense, etc.

**Rental Property Income**

* Records of income and expenses
* Rental asset information (cost, date placed in service, etc.) for depreciation

**Retirement Income**

* Pension/IRA/annuity income (1099-R)
* Social security/RRB income (1099-SSA, RRB-1099)

**Savings and Investments**

* Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
* Income from sales of stock or other property (1099-B, 1099-S)
* Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

**Other Income**

* Unemployment, state tax refund (1099-G)
* Gambling income (W-2G or records showing income, as well as expense records)
* Amount of any alimony received
* Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
* Jury duty records
* Hobby income and expenses
* Prizes and awards
* Other 1099

**Other Deductions and Credits**

* Receipts for classroom expenses (for educators in grades K-12)
* Form 5498-SA showing HSA contributions
* Record of moving expenses not reimbursed by employer
* Forms 1098 or other mortgage interest statements
* Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
* Real estate and personal property tax records
* Invoice showing amount of vehicle sales tax paid
* Cash amounts donated to houses of worship, schools, other charitable organizations
* Records of non-cash charitable donations
* Amounts paid for healthcare insurance and to doctors, dentists, hospitals
* Amounts of miles driven for charitable or medical purposes
* Expenses related to your investments
* Amount paid for the preparation of last year’s tax return
* Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
* Job-hunting expenses
* Receipts for energy-saving home improvements
* Record of estimated tax payments made
* Documented gambling losses (losing tickets, etc)

**IRA Information**

* Form 5498 showing IRA contributions
* Traditional IRA basis

**If you were affected by a federally declared disaster**

* City/county you lived/worked/had property in
* Records to support property losses (appraisal, clean-up costs, etc.)
* Records of rebuilding/repair costs
* Insurance reimbursements/claims to be paid
* FEMA assistance information
* Check [FEMA](http://www.fema.gov) site to see if my county has been declared a federal disaster area

**The following is a list of the more common forms you may receive this tax season. Some are redundant to those listed above, but are organized below to serve as a quick reference as you start to receive Tax Forms in the mail**:

* **W-2s**: Wages, Salaries, and Tips. You will receive one from each employer you had during the year.
* **Form 1098**: Mortgage Interest Statement: Mortgage interest (and points) and certain mortgage insurance premiums paid of $600 or more.
* **1099-C**: Cancellation of Debt: Cancellation of debt of $600 or more owed to a financial institution or other lender.
* **Form 1098-E**: Student Loan Interest Statement: Student loan interest paid of $600 or more.
* **Form 1099-Q**: Payments From Qualified Education Programs (Under Sections 529 and 530): Distributions received from a Section 529 qualified tuition program (QTP) or Coverdell Education Savings Account (ESA).
* **Form 1098-T**: Tuition Statement: Qualified tuition and related expenses paid and reimbursements or refunds received. Scholarships and grants may be reported, but it optional.
* **Form 1099-DIV**: Dividends and Distributions: Dividends, capital gain distributions, or nontaxable distributions paid on stock of $10 or more and liquidation distributions of $600 or more.
* **Form 1099-INT**: Interest Income: Interest income received of $10 or more ($600 or more in some cases).
* **1099-B**: Proceeds from Broker and Barter Exchange Transactions: Information on sales or redemptions of securities, futures transactions, commodities, and barter exchange transactions
* **Form 1099-G**: Certain Government Payments: Unemployment compensation, state and local income tax refunds, agricultural payments, and taxable government grants.
* **Form 1099-H**: Health Coverage Tax Credit (HCTC) Advance Payments: Advance payments of health insurance premiums received by eligible trade adjustment assistance (TAA), Reemployment TAA, or Pension Benefit Guaranty Corporation (PBGC) pension recipients.
* **Form 1099-K**: Merchant Card and Third Party Network Payments: Payments received by credit card or payments of more than $20,000 received through a third party payment network.
* **Form 1099-LTC**: Long-Term Care and Accelerated Death Benefits: Payments received under a long-term care insurance contract and accelerated death benefits received under a life insurance contract or viatical settlement.
* **Form 1099-OID**: Original Issue Discount: Original issue discount (OID) of $10 or more on a bond or other indebtedness.
* **Form 1099-PATR**: Taxable Distributions Received From Cooperatives: Passed-through distributions received from a cooperative of $10 or more, including pass-through credits and domestic production activities deductions.
* **Form 1099-R:** Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.: Distributions of $10 or more received from a retirement plan, profit sharing plan, regular or Roth IRA, an insurance contract, an annuity, survivor income benefit plan. Also reports retirement plan rollovers, certain disability payments, death benefit payments, and distributions from nonqualified deferred compensation plans.
* **Form 1099-S:** Proceeds From Real Estate Transactions: Gross proceeds of $600 or more from the sale or exchange of real estate.
* **Form 1099-SA**: Distributions From an HSA, Archer MSA, or Medicare Advantage MSA: Distributions from health savings accounts, Archer medical savings accounts, and Medicare Advantage medical savings accounts.
* **1099-A**: Acquisition or Abandonment of Secured Property: Information about the acquisition by the lender or abandonment by the borrower of property that is security for a debt.
* **Form 1099-MISC**: Miscellaneous Income: Reports payments of $600 or more made in the course of business to a contractor or other service provider. Other reportable business payments include rents of $600 or more to an individual landlord, partnership, or estate; attorney’s fees of any amount; barter exchange services valued at $600 or more; wages of a deceased employee paid to an estate or beneficiary; and royalties of $10 or more.
* **Form 1098-C**: Contributions of Motor Vehicles, Boats, and Airplanes: Information regarding a donated motor vehicle, boat or airplane with a claimed value of more than $500.