



## **COMMON TAX DOCUMENTS REQUIRED**

- Completed Tax Organizer (See the [Personal Return Organizer](#))
- W-2s
- Interest & Dividends (1099-INT & 1099-DIV)
- Sales of Stock, Land, etc. for Capital Gains (Form 1099-B)
- IRA Contributions &/or Distributions (1099-R)
- Health Care Coverage (Form 1095)
- Other Income (1099-G, 1099-MISC)
- Child Tax Credit Payments (Letter 6419)
- Economic Stimulus Payments Received
- Medical Receipts
- Mortgage Interest, Property Taxes Paid (1098)
- Education Expenses (1098-T)
- Foreign Account Information
- Unincorporated Business Income & Expenses (See the [Sole Proprietorship Organizer](#))
- Partnerships, S corporations, Estates and Trusts (K-1)
- Charitable Donation Receipts
- Child and Other Dependent Care Receipts
- 529 Contributions
- HSA Contributions (5498-SA)
- Rental Income & Expenses (See [Rental Property Organizer](#))
- Estimated Tax Payments Made
- Unemployment Income
- Social Security Income (Form SSA-1099)
- Anything special happen this year? Provide backup details:
  - Buying/selling a house (1099-S)
  - New Marriage or Divorce
  - New baby
  - You Moved