

## Income Tax Filing Information

### Important Tax Documents

*(Gather these documents in order to file your taxes.)*

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| <ul style="list-style-type: none"> <li>(W-2) Income from Employers</li> <li>(W-2G) Gambling Winnings</li> <br/> <li>(1098) Mortgage Interest Statement</li> <li>(1098-E) Student Loan Interest</li> <li>(1098-T) Tuition Statements</li> <br/> <li>(1099-A) Acquisition or abandonment of secured property</li> <li>(1099-B) Stocks, Bonds, Bartering</li> <li>(1099-C) Canceled Debt</li> <li>(1099-DIV) Dividend Statement</li> <li>(1099-G) Unemployment Compensation/State Tax Refunds</li> <li>(1099-INT) Interest Statements</li> <li>(1099-LTC) Long Term Care Benefits</li> <li>(1099-Misc) Miscellaneous Income</li> <li>(1099-Q) Qualified Education Program Payments</li> <li>(1099-R) Pension/IRA/401(k) Distributions</li> </ul> | <ul style="list-style-type: none"> <li>(1099-S) Real Estate Sales</li> <li>(1099-SA) Health Savings Accounts</li> <li>(K-1) Shareholder's Share of Income from Partnerships, LLCs or S-Corporations</li> <br/> <li>Alimony</li> <li>Childcare Fee Statements</li> <li>Donation Receipts &amp; Statements</li> <br/> <li>IRA Deposits &amp; Withdrawals</li> <li>Rental Property Income</li> <li>Settlement Statements (Purchase or Sale of Property)</li> <li>Social Security Benefits Statement</li> <li>Rail Road Benefits Statements</li> <li>Veterans Benefits Statement</li> <br/> <li>Any statement you receive that says<br/> <b>"Important Tax Document"</b></li> </ul> |
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### Medical Expenses

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| <ul style="list-style-type: none"> <li>Insurance (<i>Out of Pocket &amp; Withheld from paycheck</i>)</li> <li>Co-Payments</li> <li>Prescriptions/Birth Control/Insulin &amp; supplies</li> <li>Glasses/Contacts &amp; Solution</li> <li>Hearing Aids &amp; Batteries</li> <li>Medical/Dental Exams</li> <li>Eye Exams</li> <li>Mental/Physical Therapy*</li> <li>X-Rays, Labs, Clinics*</li> <li>Braces/Dental Work</li> <li>Crutches/Wheelchairs</li> <li>Orthopedic Shoes</li> <li>Guide Dog &amp; their care</li> </ul> | <ul style="list-style-type: none"> <li>Laser Eye Surgery</li> <li>Ambulance Service</li> <li>Mileage to/from Medical Care</li> <li>Parking &amp; Tolls</li> <li>Acupuncture/Chiropractor</li> <li>Artificial Limbs and Teeth</li> <li>Lodging while away from home for treatments</li> <li>Nursing Help</li> <li>Hospital Care (<i>including Meals &amp; Lodging</i>)</li> <li>Long Term Care Services</li> <li>Stop Smoking Programs &amp; Prescriptions*</li> </ul> | <ul style="list-style-type: none"> <li>Weight Loss Programs for Specific Disease*</li> <li>Medical Center Treatment for Drug/Alcohol Addiction</li> <li>Special Schools &amp; Transportation for physically/mentally handicapped</li> <li>Hand Controls for Car</li> <li>TTY Equipment/Installation</li> <li>Oxygen Tanks &amp; Equipment</li> <br/> <li><i>(*Must be ordered or prescribed by Doctor)</i></li> </ul> |
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### Donations

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| <ul style="list-style-type: none"> <li>Cash/Check (ex: Church, Feed the Hungry, etc)</li> <li>Payroll Deduction (ex: United Way, Red Cross)</li> <li>Charitable Mileage</li> <li>Other Charitable Costs</li> <li>Appraisal fees to determine the value of Donations</li> </ul> | <ul style="list-style-type: none"> <li>Non-Cash Items (ex: Clothing, Furniture, Food)</li> <li>Date of Donation</li> <li>Non-Profit Organization Name</li> <li>Address</li> <li>Items</li> <li>Value of Items</li> </ul> |
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**Other Deductions**

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State Tax Payments <i>(Other than thru your job)</i>	Licenses/Permits	Safe Deposit Box
Estimated Taxes paid	Uniforms/Protective Gear	Professional Magazines
Real Estate Taxes	Boots/Gloves/Safety Goggles	529 Plan Contributions
Car/Boat Tags	Uniform Maintenance	Loans made to family/friends that have not been repaid
Motorcycle Tag	<i>(Cleaning, Alterations)</i>	Job Search
Educational Expenses	Tools required for job	Resumes/Printing
Roundtrip Mileage to Class	Continuing Education	Mileage (for interviews)
Books/Software	Income Tax Preparation	Employment Agency Fees
Testing Fees	Name of Child Care Provider	Mailing Expenses
Tuition	Address	Faxing Charges
Mortgage Interest & Points	Tax Id or SS#	Travel
Union Dues	Child Care Fees Paid	Research
Professional Association Fees	Investment & Broker Fees	
	Internet Trading Fees	
	Legal Fees/Advise	

**Moving Expenses**

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*(\*Must be More than 50 Miles in connection with Job)*

Date of Move	Mileage: old home to old job
Old Home City	Packing Materials
New Home City	Hotels
Truck Rental	Moving Company Fees
Amount Employer Reimbursed	Storage
Mileage: old home to new job	

**Rental Property**

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*Each property's expenses must be listed separately.*

Date Purchased	Fence	Moving Expenses for
Purchase Price	Filing Fees	Equipment/Appliances
Property Address	Fire Extinguishers	Office Supplies/Books
Date Sold	Floors	Office Rent
Selling Price	Furniture	Painting
Date Rented	Item	Pest Control
Rent Received	Date of Purchase	Plants/Flowers
Advertising	Cost	Plumbing
Appliances	Homeowners Association	Points
Item	Fees	Refinance Charges
Date of Purchase	Installation Fees	Rent Received
Cost	Inspections	Rent Collection Costs
Appraisals	Insurance	Repairs
Assessment Fees	Investment Counseling Costs	Roof
Blinds/Curtains	Lawn Maintenance	Sanitation
Bookkeeping	Leasehold Improvements	Salaries
Carpet	Lease Preparation	Security System
Cleaning Service	Legal Fees	Smoke Alarms
Cleaning Supplies	Maintenance	Stationery & Supplies
Closing Costs	Major Improvements	Supplies
Commissions	Management Fees	Taxes
Contractor Fees	Mileage	Tax Counseling
Decoration Costs	Misc. Items (Light Bulbs, Door	Tax Return Preparation
Deposits	Knobs, Faucets, etc)	Traveling Expenses
Electrician	Mortgage Interest	Utilities

## Self Employment/ Business Deductions

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Income	Filing Fees	Sanitation
Accountant	Faxing Charges	Security System/Alarms
Advertising	Freight	Software
Business Cards	Furniture Purchased	Storage
Flyers/Posters	Item	Supplies
Stationery	Date Purchased	Taxes
TV/Radio	Cost	Federal
Telephone Directory	% of Business Use	State
Newspaper/Magazine	Furniture Rental/Lease	Employer
Billboards/Signs	Gifts to Customers	Payroll
Internet Banners/etc.	Gifts to Employees	Business Property
Specialty Items (Pens, Cups, Magnets, etc.)	Gifts to Other Businesses	Sales
Answering Service	Graphic Design	Tax Counseling
<b>Auto Expenses:</b>	Insurance	Tax Preparation
Business Miles	Liability	Telephone
Commuting Miles	Disability	Office
Personal Miles	Errors & Omissions	Cellular
Total Miles for the year	Health	Travel
Monthly Payment	Life	Air Fare
Total Cost of Vehicle	Malpractice	Cab Fare
Make, Model & Year	Workers Compensation	Hotel
Date Business Use Began	Information Services	Tools
Parking/Tolls	Internet Services/DSL	Utilities
Gas/Oil	Interest on Business Loans	Electricity
Car Washes/Waxes	Inventory	Gas
Insurance	Janitorial Services	Sanitation
Garage Rent	Licenses/Permits	Water
Tires/Accessories	Legal Fees	Cable (Commercial Office Only)
Repairs	Magazine/Newsletter	Uniforms
Inspection/Registration	Subscriptions	Purchase
Taxes	Mailing Lists	Cleaning/Maintenance
Bank Fees	Marketing Promotions	Website/Web Hosting
Billing Service	Market Research	Wages
Bookkeeping	Meals & Entertainment	
Bonds (Surety, Fidelity, etc)	Mortgage Interest (Purchase of Business Building)	<b>Home Office – Complete this Section only if your office is located in your home.</b>
Catering	Music System (in Office)	
Check Validation Service	Music (CDs/Tapes)	
Commissions	Office Supplies (Ex: Paper, Pens, Ink, etc.)	Total Sq. Footage of Home
Consultant Fees	Payroll Service	Sq. Footage of Office Area
Contractors	Pension Plans	Monthly Rent
Courier Service	Profit Sharing	Mortgage Payment
Credit Card Terminal Rental	Employee Benefit Programs	Utilities
Credit Card Service Fees	SEP	Electricity
Delivery Charges	401(k)	Gas
Decorating Expenses	Cafeteria Plan	Water
Donations	Postage	Garbage
Drinking Water	Post Office Box	Repairs to Home
Books	Professional Services	Repairs to Office Space
Classes/Seminars	Prof. Association Dues	Home Owners Insurance
Workshops/Conferences	Pager	Association Fees
Equipment Purchases	Printing	Security Alarm Service
Item	Prizes	Decorating/Painting Art/Plants
Date Purchased	Referral Fees	Total Cost of Home
Cost	Rent (Office Space)	Date Business use Began
Equipment Rental/Lease		