

**PERSONAL**

- Copy of Driver's License, Address, phone numbers & dependent info - if any changes**
- Copy of Social Security Card(s) - Taxpayer, spouse & dependents ONLY IF WE DON'T HAVE ON FILE
- Copy birth certificate and SS card for new dependents on return
- Copy of check, voided check, or bank statement showing account number for direct deposit**

**1040 INFORMATION**

- Wage Statements - W-2s (please verify personal info correct ex: name,address,SS#,wage amts)
- Interest and Dividend Income - 1099INT/1099DIV
- State Refund Amount - only if you itemized the previous year
- Sale of Securities - 1099B (please provide info for cost basis)
- Year End Investment statements
- Sched C Income (self-employed) - 1099-Misc, Commissions. Earnings & Expenses
- IRA, Pension & Annuities Retirement Income - 1099-Rs
- Income and Expenses from Rental Property
- Royalty, Partnership, Corporation and Trust Income (includes K-1's)
- Farm Income & Expenses
- Unemployment income - 1099G
- Social Security-Railroad
- Jury Duty Pay
- Lottery or Gambling Winnings/Losses - W-2G
- Alimony
- Any other income not listed above
- Medical savings accounts
- Health savings account
- IRA contributions
- Student Loan Interest Paid
- Adoption Expenses
- Educator Expenses
- Educational Expenses -tuition for post-high school (Form 1098-T) & continuing education for adults
- Indiana Edu Deduction - proof of educations expenses for K-12
- Child Care Expenses, Provider's name, address & Tax ID or SS#
- Residential energy efficient purchases (copy of sales receipt & manufacturer certifications)
- Indiana plan - Long Term Care Prem & 529 contributions
- ESTIMATED TAX PAYMENTS** - Please provide proof of payments
- Documents needed to claim EIC**
- ACA form 1095 and/or health insurance info (amt,#of months covered, type of plan...)**

**FOR TAXPAYERS WHO ITEMIZE**

**Standard MFJ is now \$24,000/Single \$12,000/HOH \$18,000**

- Medical & Dental Expenses --subject to 7.5 of AGI (includes insurance premiums)
- New Vehicle sales tax (copy of purchase showing sales tax amount) if using sales tax deduction
- Real Estate Tax (All Indiana Residents for State Return) - please provide copy of payment**
- Rent Pd, # of months, Name & Address of Landlord (All Indiana Residents for State Return)**
- Mortgage, Home Equity Loan Interest only if used to improve current home
- Cash and Noncash Charitable Donations

**This list is not all inclusive. It is intended as a helpful tool in gathering tax information.**