TAX DOCUMENT CHECKLIST

The following is a list of documents commonly seen in the preparation of individual income tax returns. Please use this as a guide to help you gather the documents necessary to prepare your tax return. It is likely that not everything on this list will apply to your specific situation; there could be documents not on this list that apply to you.

- [ ] W-2 (wages) Separate form from each employer
- [ ] 1099-G (unemployment, other government payments such as tax refunds)
- [ ] 1099-R (pension, IRA distributions, 401k withdrawals)
- [ ] 1099-INT (interest income)
- [ ] 1099-DIV (dividend income)
- [ ] 1099-B (sales from brokerages, such as stock sales)
- [ ] 1099-SSA (social security income)
- [ ] 1099-C (cancelled debt)
- [ ] W2-G (gambling winnings and losses)
- [ ] 1098 (mortgage interest paid)
- [ ] 1098-E (student loan interest paid)
- [ ] 1098-T (college tuition)
- [ ] Property Taxes paid
- [ ] Copy of closing statement if you bought, sold or refinanced a home
- [ ] Details of estimated tax payments to IRS, Oregon, City of Portland, Tri-Met or any other state/local entity
- [ ] Mileage Worksheet completed and signed (if you have vehicle expenses related to a business you own or managing your rental properties), miles driven for charity and/or medical
- [ ] Charitable Donations (summary of amount or items given with total FMV, oranization name, & date)
- [ ] Political Contributions
- [ ] Alimony paid/Received
- [ ] IRA Contributions (ROTH or Traditional, Form 5498 if available)
- [ ] Medical Expenses (Rx, insurance premiums, copays, vision, dental, hearing aids/batteries, equipment)
  Forms - 1095-A (marketplace insurance), 1099-SA (HSA)
- [ ] Adjustments to income may include educator expenses, health savings account contributions, IRA contributions, etc
- [ ] Other Income may include business income, rental income, trustee fees, stipends, settlement payments, etc.

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