

## **General Checklist**

- **Copy of Previous year's Tax Return \_\_\_\_\_**
- **W-2's**
- **W-2G (State tax refund/Gambling Winnings)**
- **1099's (non-employee comp/Rents/Royalties/Retirement/Pension)**
- **1099-INT (Bank interest)**
- **1099-B (Proceed from Broker and Barter Exchange Transactions)**
- **Health Insurance (1095-B or C)**
- **Education cost (1098-T)**
- **Student Loan Interest (1098-E)**
- **Cash Contributions (up to \$300/ \$600 MFJ w/out itemizing)**
- **Itemized Deductions**
  - **Medical Expenses \_\_\_\_\_**
    - Mileage- doctor visits/Travel for doctors
    - Insurance cost/Prescription & some OTC medicine

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- **Real Property Taxes**
- **Car Registration**
- **Mortgage Interest (1098)**
- **Contributions-Cash/Non-Cash (Goodwill donations)**