Income Tax Documentation Checklist

Filing Status and Dependent Info	Self-Employment (see Repair Regulations)
Lease Agreement/Rent Receipts	1099MISC and/or Record of Income Received
Utiltiy Bills	Mileage (log book required for your records)
Social Security Cards	Supplies
Birth Certificates	Materials
Valid Driver's License or State ID	Insurance
	Wages/Commissions
Income Forms	Travel/Entertainment/Meals
W2s	New/Used Equipment Purchases
Dividend Statements	Advertising Expenses
Bank Interest Statements	Auto/Equipment Repairs
1099R - Retirement/Pension	Fuel Expenses
Unemployment Statements (1099-G)	License Fees
Social Security Statement	Repairs/Maintenance
Stock Sales	Utilities
K-1's	Contract Labor
W2G (Gambling Winnings)	Rents
1099A and 1099C (Cancellation of Debt)	Interest
Alimony Paid/Received	Office Expenses
	Equipment Purchased
<u>Deductions</u>	Bank statements
Mortgage Interest Statements	
Property Tax Statements	
Child Care Expenses (Tax ID or SSN required)	Rental Property (see Repair Regulations)
Education Expenses (Form 1098-T	
& amounts paid for tuition, books, &	
supplies)	Rental Income Received
Cash Donations	Mortgage Interest Statements
Non-Cash Donations	Property Tax Statements
IRA/Roth IRA contributions	Insurance
Health Savings Account Contributions	Repairs
Educator Expenses	Supplies
Moving Expenses (job related)	Utilities
Medical Expenses	Advertising
Mileage (log book required for your records)	Legal Fees
Closing Statement (new purchase or sale)	Maintenance/Cleaning
Job Seeking Expenses	Inspection
Student Loan Interest	Closing Statement (new purchase or sale)
	Improvements
Health Insurance Information	Inspection Fees
Proof of Insurance Coverage for everyone on tax return	Management Fees
1095-A Health Insurance Marketplace Statement	Landscaping
1095-B Health Coverage	Bank Statements
1000 B Health Coverage	Bank Statements
1095-C Employer Provided Health	
Insurance Offer & Coverage	Credit Card Statements
	Mileage (log book required for your records)
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Note:

For stock sales bring purchase and sales price if not included on statement provided by brokerage For Child Care Credit, bring Tax ID or Social Security number, name and address of provider For Cash Donations a written statement/cancelled check are required for your records All Expenses and Income must be substantiated with necessary documentation if audited