INCOME

- **Employed / Unemployed**
  - Forms W-2
  - Unemployment, state tax refund (1099-G)
- **Self-Employed**
  - Summarized income records including revenue not reported on Form 1099-MISC
  - Summarized expenses from check registers, credit card statements, and receipts
  - Purchases of business-use equipment (cost, date placed in service)
  - In-Home office information (utilities, insurance, repairs & maintenance)
- **Rental Income**
  - Summarized records of income and expenses
  - Rental improvements (cost, date placed in service)
- **Retirement Income**
  - Pension/IRA/annuity income (1099-R)
  - Records of any Qualified Charitable Distribution
  - Traditional IRA contribution records
  - Social security/RRB income (1099-SSA, RRB-1099)
- **Savings & Investments**
  - Interest and dividend income (1099-INT, 1099-OID, 1099-DIV)
  - Income from sales of stock or other property (1099-B, 1099-S)
  - Dates of acquisition and records of your cost or other basis in property you sold
  - Expenses related to your investments
  - K-1's
  - Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
- **Other Income & Losses**
  - Gambling income (W-2G or records showing income, as well as expense records)
  - Jury duty records
  - Hobby income and expenses
  - Prizes and awards
  - Trusts
  - Royalty Income 1099 Misc.
  - Any other 1099s received
  - Record of alimony paid/received with Ex-spouse's name and SSN
- **Estimated Tax Payments**
  - Record of estimated tax payments made (Form 1040ES)
  - Amount of state/local income tax paid (other than wage withholdings)

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DEDUCTIONS

- **Home Ownership**
  - Forms 1098 or other mortgage interest statements
  - Real estate and personal property tax records
  - Receipts for energy-saving home improvements
- **Charitable Donations**
  - Cash amounts donated to charitable organizations
  - Records of non-cash charitable donations
- **Medical Expenses & Health Insurance**
  - Amounts paid to doctors, dentists, hospitals and after-tax payments for health insurance
  - Form 1095-A if you enrolled in an insurance plan through the Marketplace
  - Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e . an employer, insurance company, government health plan such as Medicare, Medicaid, CHIP, TRICARE, VA, etc.)
  - Marketplace exemption certificate (ECN) if you applied for and received an exemption from the Marketplace
- **Childcare Expenses**
  - Fees paid to a licensed day care center or family day care for infant or preschooler (including address and EIN number)
  - Wages paid to a baby-sitter.
- **Educational Expenses**
  - Forms 1098-T from educational institutions
  - Receipts that itemize qualified educational expenses
  - Records of any scholarships or fellowships you received
  - Form1098-E if you paid student loan interest
- **Job Expenses & Tax Prep Fees**
  - Employment related vehicle expenses (tolls, mileage, gas, maintenance, license, property tax, interest expense, parking)
  - Receipts for classroom expenses (for educators in grades K-12)
  - Employment-related expenses (dues, publications, tools, uniform cost and cleaning, travel)
  - Job-hunting expenses
  - Record of moving expenses not reimbursed by employer
  - Amount paid for preparation of last year's tax return
- **State & Local Taxes or Sales Tax**
  - Amount of state/local income tax paid (other than wage withholding), or amount of state and local sales tax paid
  - Invoice showing amount of vehicle sales tax paid
- **Retirement & Other Savings**
  - Form 5498-SA showing HSA contributions
  - Form 5498 showing IRA contributions
  - All other 5498 series forms (5498-QA, 5498-ESA)

To further assist you in gathering your relevant tax information, our team has crafted some helpful tips:

MEDICAL/DENTAL EXPENSES

- Contact your pharmacy for a year-end itemized prescription statement.
- Your health network may also be able to provide a year-end statement of co-payments.
- Review your calendar for medical appointments, to calculate mileage.

TAXES PAID

- Review your checkbook/bank statements for payments of quarterly income taxes.

  PLEASE NOTE: These 2018 payments would have been made in April 2018, June 2018, September 2018 and/or December 2018/January 2019.

- If you purchased a vehicle during 2018, refer to the original purchase paperwork for the amount of sales tax paid.

CHARITABLE CONTRIBUTIONS

- Please summarize all of your monetary donations to charitable organizations.
- For non-cash contributions, we will need the following:
  - Name and Address of organization
  - Date of contribution
  - Description of items donated
  - Thrift store valuations

    PLEASE NOTE: Visit our website (valleynationalgroup.com/tax) for links to valuation guides from Goodwill and Salvation Army to help determine the thrift store values of your donation.