



**To help you gather your documents:**



**COMMONLY MISSED ITEMS**

Worksheets can be found under **Required Forms** at [www.doesmytaxes.com](http://www.doesmytaxes.com)

- Did you include worksheets for Self-Employed, Home Office, Rental Property?
- Alimony: Name, SSN and Amount
- Childcare Credit, Name, Address, Tax ID, Phone number and Amount of payments



**INCOME STATEMENTS, EMPLOYMENT, INVESTMENT & RETIREMENT**

- All forms that say W-2, 1099's, WG (gambling) or K-1 from other income source.
- 1099B Investment Statements – Employer stock, please look up cost basis for us.
- Interest and Dividend Statements, from bank and investment companies
- 1099 C – Cancellation of Debt – [www.doesmytaxes.com](http://www.doesmytaxes.com) complete worksheet, unless you filed BK.



**EDUCATION – FOR YOU OR YOUR DEPENDENTS**

- Student Loan Interest Paid
- 1098- Tuition Tax Form, Records of tuition and other higher education expenses



**ITEMIZED DEDUCTIONS**

- Mortgage interest, real estate property tax, and personal property (DMV VLF)
- Amount of Tax Paid for large items: Car, Truck, Boat, etc
- Records of amounts donated to church, schools, and other charitable organizations
- Records of non-cash charitable donations, address, dates and description of items
- Unreimbursed Employee expenses – [www.Doesmytaxes.com](http://www.Doesmytaxes.com) for worksheet



**HEALTH CARE-**

**Federal refunds will be held if these forms are not included with your return.**

- Form 1095-A if you enrolled in an insured plan through the Marketplace (Exchange)
- Form 1095-B or Form 1095-C, if you have insurance through a private plan or employer plan
- HSA information (Forms 5498, 1099-SA)