



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, organization 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)
- ☐ Educator expenses, health savings account info, IRA contributions, car loan interest, overtime pay details, etc.
- ☐ Other Income may include business income, rental income, trustee fees, stipends, settlement payments, etc.