

TAX DOCUMENTS

*Open all your mail; remove documents from envelopes
Print everything
Remove all staples from documents*

GENERAL DOCUMENTS TO PROVIDE:

Review last year's tax documents
W-2's (and final pay stub of the year)
1099's
1099G - unemployment & state tax refunds
Form SSA-1099 or RRB-1099 - social security & railroad retirement benefits
Alimony received or paid
Brokerage statements
K-1's
Deductions
Donations
Mileage - for self-employed & landlords (business purpose, where, when)
Certificate of rent/property tax statement
Any tax notices received from the IRS or other taxing authorities
IRA contributions - outside of work
529 educational plan contributions - Acct #, bank name, child's name & social

DOCUMENTS MOST OFTEN MISSING:

Social Security number and birthdate of new child
1099SA - health savings account spending
1098T - college tuition; check online through student portal
1098 mortgage - mortgage interest paid
1099R - retirement distributions or rollovers
1098E - student loan interest; check January statement
1095 A, B, or C - proof of health insurance
Closing papers - sale/purchase/refinance of home - CLOSING DISCLOSURE STATEMENT
Daycare statements
Estimated payments - date and amount, if applicable **

** Each year taxpayers receive letters from the IRS informing them that their tax return has been adjusted because the wrong amount for "estimated tax payments" was used. If you paid estimated taxes and are not 100% sure of the amount, please verify your deposits by calling 1-800-829-1040 (IRS) and 651-296-3781 (MN).