

## TAX DOCUMENTS

### GENERAL DOCUMENTS TO PROVIDE:

Notice 1444 or details of stimulus check (New for 2020)  
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 *AND the date of the alimony agreement*  
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  
Picture of driver's licenses  
Voided check or bank account number and routing

### **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 - proof of health insurance through an exchange  
Closing papers – sale/purchase/refinance of home – CLOSING DISCLOSURE STATEMENT  
Daycare statements – *get from provider*  
Estimated payments - date and amount, if applicable \*\*  
Disclosure of foreign bank account information, 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).