

Tax Folio 1/1/2014 to 12/31/2014

Income from:	
	Employment = W-2 forms
	Interest and dividends = 1099-INT, 1099-DIV, 1099-OID
	Sale of stock or property = 1099-B, 1099-S
	Partnership = K-1
	Alimony
	Your business = includes hobby, rental, farming, etc.
	Distribution from IRA, Pension, or Social Security = 1099-R, 8606, SSA-1099
	Sale of property = 1099-C
	Scholarships
	Gambling, Prizes and awards, Jury duty
	State tax refund from prior year – 1099-G
	Health care reimbursements – 1099-SA, 1099-LTC
	Other misc. 1099s

Other payments:	
	IRA contributions
	Medical Savings Account Contributions
	Donations to charity/miles driven to charity

Expenses from:	
	Employment expenses not reimbursed
	Job hunting expenses
	Moving expenses
	Expenses related to managing your investments
	Expense incurred to create tax return
	Business expenses = includes hobby, rental, farming, etc.
	Medical expenses
	Education expenses – 1098-T, 1098-E
	Student loan interest
	Mortgage interest – Form 1098
	Real estate/property taxes
	Child care costs - provider's name, address, tax id
	Adoption costs
	Alimony paid
	Self-employed health insurance
	Casualty and theft losses

