

The checklist below includes items to bring help prepare your tax return(s)

- _____ Last year's tax return(s) (If not prepared by VIMCOR)
- _____ Social Security cards or other official documentation for yourself and all your dependents
- _____ Photo I.D. required for all taxpayers.
- _____ Checkbook if you want to direct deposit any refund(s).

Income

- _____ W-2 from each employer
- _____ Unemployment compensation statements
- _____ SSA-1099 form showing the total Social Security benefits paid to you for the year, or Form RRB-1099, Tier 1 Railroad Retirement benefits
- _____ 1099 forms reporting interest (1099-INT), dividends (1099-DIV), proceeds from sales (1099-B), as well as documentation showing the original purchase price of your sold assets
- _____ 1099-R form if you received a pension, annuity, or IRA distribution
- _____ Rental income amounts, if any, and rental property expenses (property taxes, car mileage, repairs, etc).
- _____ 1099-Misc forms
- _____ Information about other forms of Income
- _____ State or local income tax refund

Payments

_____ All forms and canceled checks indicating federal and state income tax paid (including quarterly estimated tax payments)

Deductions

Most taxpayers have a choice of taking either a standard deduction or itemizing their deductions. If you have a substantial amount of deductions, you may want to itemize. You will need to bring the following information:

- _____ 1098 form showing any home mortgage interest
- _____ 1098-T and 1098-E forms (Tuition and Student Loan Interest payments)
- _____ A list of medical/dental expenses (including doctor and hospital bills and medical insurance premiums), prescription medicines, costs of assisted living services, and bills for home improvements such as ramps and railings for people with disabilities
- _____ Summary of contributions to charity
- _____ Receipts or canceled checks for all quarterly or other paid tax
- _____ Property Tax bills and proof of payment
- _____ Health Insurance
- _____ Form 1095A if you purchased through Marketplace (Exchange)
- _____ Any exemption correspondence from the Marketplace (if applicable)

Credits

- _____ Dependent care provider information (name, employer ID, or Social Security number)
- _____ 1099 forms related to continuing education and related receipts and canceled checks