MONEYWISE INCOME TAX

What Documents will I need to file my Taxes

Income Forms

- ☐ W-2
- ☐ 1099-INT (Interest from Banks)
- ☐ 1099-B Income or Loss from Stock Sales
- ☐ 1099-B Crypto Currency
- ☐ 1099-G (Unemplolyment)
- ☐ 1099-DIV (Dividned Income)
- ☐ 1099-R (Pension or Retirement Income)
- ☐ SSA-1099 (Social Security Benefits)
- ☐ 1099-NEC (Non- Employee compensation)
- ☐ 1099-MISC (Miscellaneous Income)
- ☐ 1099-C (Cancelation of debt)
- ☐ W-2G (Gambling winnings)
- ☐ Rental Income

Deductions from Income

- ☐ Form 1098 for Mortgage Interest Paid
- ☐ Alimony paid
- ☐ Licnese Plate fees
- ☐ Charitable Contributions
- ☐ Out of pocket Medical Expenses (you are only able to use deduction if over 7.5% over your AGI)
- ☐ Gambling Losses
- ☐ Sale or purchase of home closing statement
- ☐ Property Taxes paid in 2022

Adjustments to Income

- ☐ Tuition paid to College or Universities (please provide 1098T form)
- ☐ Student Loan Interest paid
- ☐ Traditional or Roth IRA contributions (if 401k through employer, we will get info from w2)
- ☐ HSA Contributions and Distributions (Health Savings Account)
- ☐ Educator out of pocket expense
- ☐ Child Care Expenses (from a licensed child care provider)
- ☐ Energy Efficient Home Improvments (Roof, Windows, Insulation, Doors...)

Federal State and Local estiamted payments made in 2022

	Date	Amount	Date	Amount	Date	Amount	Date	Amount
Federal								
State								
City								