

Income:

- W-2's
- 1099 Series:
 - 1099- A (Acquisition or Abandonment of Secured Property)
 - 1099- B (Proceeds from Broker & Barter Exchange)
 - 1099- C (Cancellation of Debt)
 - 1099- DIV (Dividends & Distributions)
 - 1099- G (Certain Government Payments)
 - 1099- INT (Interest Income)
 - 1099- K (Merchant Card & Third Party Network Payments)
 - 1099- LTC (Long-Term Care & Accelerated Death Benefit)
 - 1099- MISC (Misc. Income)
 - 1099- OID (Original Issue Discount)
 - 1099- PATR (Taxable Distributions Received from Cooperatives)
 - 1099- Q (Payment from Qualified Education)
 - 1099- R (Distributions from Pensions, Annuities, Retirement, IRA, etc.)
 - 1099- S (Proceeds from Real Estate)
 - 1099- SA (Distributions from HSA, Archer MSA, Medicare Advantage MSA)
 - 1099- RRB (Payments by RBR)
 - 1099- SSA (Social Security Benefit Statement)
- Alimony Received
- Business Net Income/ Loss
- K-1's from Partnerships/ S-Corp
- Other Income
 - Gambling, Lottery, Rewards
- Rental Income/ Expense
- Sales Tax Paid
 - Need proof of payment if not done by Kaba Consulting Inc.
- Unemployment Compensation

Deductions:

- Medical Expenses
 - Examples in next attachment
- 1098 Series:
 - 1098 (Mortgage Interest)
 - 1098- C (Contributions of Motor Vehicles, Boats, & Airplanes)
 - 1098- E (Student Loan Interest)
 - 1098- T (Tuition Statement)
- Investment Interest
- Charitable Contributions
 - Proof is necessary
- Moving Expenses
- Childcare Expenses
 - FEIN & Address of Provider
- Alimony Paid
- Tuition Expenses
 - Books
- IRA, Roth, SEP, & Keough Contributions
- Qualifying Energy Credits
 - Windows & Doors
 - Roof & Insulation
 - Wood & Pellet Stoves
 - HVAC & Water Heaters
 - Geothermal pumps, Solar Panels, Fuel Cells
- Taxes Paid
 - Real Estate Taxes
 - State Income Taxes (if applicable)
 - Property Taxes
 - Estimated Tax Payments
 - Federal: Proof of payment
 - State: Proof of payment
- Home Sale/Purchase Info
 - HUD Statement
- Stock Sales
 - Cost, Date Purchased, Date Sold

Miscellaneous:

- Copies of Previous Year Tax Return
 - If not done by Kaba Consulting Inc.
- Personal Information:
 - For Tax payer, Spouse, & Dependents
 - Social Security numbers, Dates of births, Health Insurance Coverage (Full year, Half Year, no coverage)
 - If Obama Care applies, taxes cannot be filed until form 1095-A is received
 - If no coverage, expect a penalty for each dependent (if any) plus self