

<b>If you had:</b>	<b>Please bring:</b>
Employee Wages	W-2
Unemployment	1099-G
Interest Income	1099-INT
Dividends	1099-DIV
Sold Real Estate	1099-S
Prizes and awards	1099-MISC
Stock Sales	1099-B and cost basis if not shown on 1099-B
IRA Distributions	1099-R
IRA Contributions	5498 or other document showing amount contributed
Social Security	1099-SSA
Gambling Winnings	W-2G as well as amount of gambling losses
Tuition Payments	1098-T
Education Expenses	Receipts from educational institution
Student Loan Interest	1098-E
Mortgage Interest	1098
Estimated Tax Payments	The amount and date of each payment
Alimony Paid	Name and SSN of ex-spouse and total amount paid
Alimony Received	Total amount received
Healthcare Reimbursements (HSA)	1099-SA
HSA Contributions	If employed, W-2; if self-contributed, 5498-SA
Property Taxes	Receipt showing date and amount paid
Charitable Contributions – Cash	Receipts or list amount on Client Questionnaire
Charitable Contribution – Non-Cash	Receipts or list on Client Questionnaire
Self Employment/Farm Income	Income records; records of Expenses; business vehicle mileage; ending inventory value; asset info (cost, date placed in service, etc) for depreciation
Daycare	Daycare name, EIN, and amount paid for each child
Cancellation of Debt	1099-C
Medical Expenses	List of medical, eye and dental expenses including out of pocket health insurance premiums (receipts are not needed, just total amounts paid)
State or Federal Marketplace Insurance	1095-A
Purchased Energy Efficient Improvements	Provide receipt or list the item description and cost
Rental Income	Records of income and expenses, asset info (cost, date placed in service, etc) for depreciation, record of estimated tax payments
Sales Tax on Large Purchases	Receipts for items with sales tax greater than \$10,000

**If you had:**

Paid Rent

529 Contributions

Private School Tuition

**Please bring:**

Amount paid and if heat was included or not

Amount contributed and name of student

Amount of tuition, student name and grade, school name, address and EIN

**Other information to include:**

- Your Full Legal Name, Date of Birth, Occupation and Social Security Number
- Spouse's Full Legal Name, Date of Birth, Occupation and Social Security Number
- Any Dependent's Full Legal Name, Date of Birth and Social Security Number
- Address including County, School District and type of municipality (Town, Village or City)
- Contact Information (phone and email if relevant)
- If you're a new client, bring your prior year's tax return

Because every taxpayer's situation is unique, this list is meant to be a general guide. If you have a document you are unsure of, include it with your other tax information. We'd rather have it and not need it than need it and not have it.

To best complete the information relevant to your unique tax year, please complete our **Client Questionnaire**. You can download and fill it out from our website: [www.westengraff.com](http://www.westengraff.com), or you may pick them up at our office: 413 Milwaukee Street, Kewaunee, WI 54216