



Swartz & Reeder Advisors

What do we need to complete your taxes?

Income Information

- W-2s
- 1099-INT (Interest from Bank/Credit Union)
- 1099-B Income (or loss) from Sale of Stock
- 1099-B Income from Virtual Currency
- 1099-G (Unemployment Income)
- 1099-DIV (Dividend Income)
- 1099-R (Pension/Retirement Income)
- SSA-1099 (Social Security Benefits)
- 1099-NEC (Non-employee Compensation)
- 1099-MISC (Rent Received)
- K-1 (Partnership/S-Corp Income)
- 1099-C (Cancellation of Debt)
- Alimony/Child Support Received
- Rental Income
- W-2G (Gambling/Lottery Winnings)
- Small Business Income

Deductions from Income

- Form 1098 (Mortgage Interest Paid)
- Charitable Contribution Statements
- Alimony Paid (If Divorced Prior to January 1, 2019)
- Miles Driven for Charity
- License Tab Fees for Your Vehicles
- Out-of-Pocket Medical Expenses (**may** be able to use as deduction if OVER 7.5% of your AGI)
- Gambling Losses
- Closing Statement from Sale or Purchase of Home
- Property Taxes paid in 2022 (also include bills for Winter 2021, Summer 2022, and Winter 2022)

Adjustments to Income

- Tuition Paid to College or University (Provide 1098T **AND** detailed statement from college)
- Student Loan Interest Paid
- Adoption Expenses
- Traditional or Roth IRA contributions
- Contributions to a 529 or Other Education Savings Plan
- HSA details (contributions/distributions - and were ALL funds used for medical purposes?)
- Educator's Out-Of-Pocket Expenses
- Child or Elder Care Paid to Licensed Provider (provide statement from care-giver)
- Energy Efficiency Home Improvement Credit

Provide Details on Federal, State, or City Estimated Tax Payments You Made for 2022 (dates and amounts)

	<u>Date (April)</u>	<u>Amount</u>	<u>Date (June)</u>	<u>Amount</u>	<u>Date (Sept)</u>	<u>Amount</u>	<u>Date (Jan)</u>	<u>Amount</u>
<i>Federal:</i>								
<i>State:</i>								
<i>City:</i>								