**List of Tax Preparation Forms, Documents**

**An overview of Taxable Income Forms, Documents:**

* W-2 Form(s) for Wages, Salaries, and Tips
* Interest Income Statements: Form I 099-INT & 1099-OID
* Dividend Income Statements: Form 1099-DIV
* Sales of Stock, Land, etc. for Capital Gains: Form 1099-B
* Sales of Real Estate: Form 1099-S
* State Tax Refunds: Form 1099-G
* HSA Form 1099
* Alimony Received or Paid
* Unemployment Compensation Received
* Miscellaneous Income: Form 1099-MISC
* Retirement Income: Form 1099-R
* Social Security Income and Railroad Retirement Income: Form SSA-1099
* Business Income and Expenses
* Rental Income and Expenses
* Farm Income and Expenses
* Form K-1 Income from Partnerships, Trusts, and S-Corporations

**Tax Credits:**

* Childcare Provider Address, I.D. Number and Amounts Paid
* Foreign Taxes paid
* Clean energy credit for vehicles
* Residential energy credit
* Adoption Expense Information for the Adoption Credit

**Tax deductions:**

* Medical Insurance premium
* Prescription Medicines and Drugs, Hospital, Doctor and Dentist payments
* Tax Deductible Miles Traveled for Medical Purposes
* Home Mortgage Interest from Form 1098
* HOME EQUITY INTEREST (FOR IMPROVEMENTS)
* Home Second Mortgage Interest Paid
* Real Estate Taxes Paid
* DMV
* Charitable Cash Contributions
* Fair Market Value of Non-cash Contributions to Charities
* Tax Deductible Mileage for Volunteer Purposes
* State Taxes Paid with Last Year's Return (if claiming itemized deductions)
* Student Loan Interest

**Tax Payments:**

* + Estimated Tax Payments Made with ES Vouchers
  + Last Year's Tax Return Over-Payment Applied to This Year