

## **21 Most Forgotten items**

- 21) Massachusetts residents: Form 1099-HC**
- 20) Forms W-2 for wages**
- 19) Forms 1099-INT for bank interest**
- 18) Forms 1099-DIV for dividends**
- 17) Forms 1099-G for unemployment compensation**
- 16) Forms 1099-G for state tax refunds**
- 15) Forms 1098-E for student loan interest paid**
- 14) Forms 1099-MISC for self employment income**
- 13) Information regarding gambling winnings and losses**
- 12) Form 1098 Mortgage and Real estate tax information**
- 11) Form 1098-T & itemization of tuition & fees paid for higher education expenses**
- 10) HUD-1 Settlement Statement for new home purchase or refinance**
- 9) Childcare information (name, address, tax ID of provider & amount paid)**
- 8) Cost basis (original amount paid for stocks, bonds or mutual funds sold)**
- 7) Amounts donated to charity (cash and personal property) \*\*\***
- 6) Excise tax paid for cars, trucks, trailers, boats, motorcycles, etc.**
- 5) Union Dues, tools, uniforms & other employment related expenses**
- 4) Vehicle Worksheet & mileage log for car & truck expenses**
- 3) Social security card for dependents**
- 2) Banking information for direct deposit or direct debit: including name of financial institution, routing number & account number.**
- 1) A check to pay the taxman (note that all outstanding balances are subject to an 18% interest charge).**

\*\*\*NEW\*\*\*Note that for ALL donations of property (other than cash) you will need the date of the donation, name and address of the charity, value, and an itemized list of the items with the date acquired and cost.