



Tax Filing Docs Checklist (Basic)

The full questionnaire/checklist is available on www.vimlantax.com/forms.php. However, below is something to get you started. Calendar year means (Jan 1st to Dec. 31st of the prior year). See you soon!

Income Docs:

- ✓ Your **W2s** and any “W2-Gs” for gambling/lotto winnings;
- ✓ **1099 Consolidated Brokerage Statements** (Includes the 1099-DIV);
- ✓ **1099-DIV** for your dividend statements if not in the 1099 Consolidated Brokerage Statement;
- ✓ **1099-Int** for your Interest Earnings;
- ✓ **1099-A** for any foreclosures or short sales on real estate you had & **1099-C** (Cancellation of any Debt);
- ✓ **1099-G** (Prior year state tax refunds or for your unemployment earnings);
- ✓ **1099-M** for any miscellaneous income you may have had (as contractor for e.g., etc.);
- ✓ **1099-R** for any retirement account rollovers or withdrawals;
- ✓ **1099-SA** for Health Savings Account distributions;
- ✓ **K1s** from your investments in private partnerships or corporations;
- ✓ **Details of any foreign property sales** last year;

Expense & Other Docs:

- ✓ **1095-A, 1095-B, 1095-C** Health Insurance Coverage Statements;
- ✓ **1098-E Student Loan** Interest statements (usually available online since they are not usually mailed);
- ✓ **1098-INT Mortgage** Interest Statements and **Property Tax Statements** for ALL real estate owned by you;
- ✓ **1098-T Student Loan** Interest Statements and **1098-T College Tuition** Statements (**if undergraduate, supplies expenses proof**);
- ✓ **Donation Receipts** or copies of checks, receipts, or letters from the charity proving you donated;
- ✓ **Moving expenses** & employer relocation expense reimbursement summary (**if you moved more than 50 miles for work**);
- ✓ **Proof of any purchase and installation** of new exterior doors, windows, water heater, AC unit, or furnace in your home;
- ✓ **HUD-1 Real Estate Closing Statements** for any refinances, real estate purchases, or sales you did last year;
- ✓ **Rental properties calendar year income expense summary** (you can use the rental property template off our website);
- ✓ **Job & Expenses – only if more than 2% of your total adjusted gross income**, and you itemize, then bring this in.

Contribution Docs:

- ✓ **5498-SA** for any Health Savings Account contributions; **Form 5498** for any IRA contributions last year;
- ✓ **Foreign Accounts & Income:** Calendar year MAX balances, account number, institution name, address, joint holder names;
- ✓ Your kids Kindergarten through 12th grade (including driver’s ed, graduation, registration) **school expenses** here in Illinois.
- ✓ **Bright Start, Bright Directions, and College Illinois year end statements** for your kids or for whomever you contributed.

Other Docs You Might Consider Bringing so we can help to minimize your taxes, help you with legacy issues, and financial planning:

- ✓ Life Insurance Statements and Policies;
- ✓ Brokerage & Investment Statements;
- ✓ 401K Statements and/or Work Retirement Account Statements;
- ✓ IRA and/or ROTH IRA Statements;
- ✓ Past IRS and State Tax Notices;
- ✓ Living Trust Docs and Wills, if you have them.
- ✓ Your work enrollment documentation;