Here is a list of tax documents that you might receive. Please provide all documents that are relevant to your situation.

* **New – 1099-K for transactions totaling $600 or more.** This will affect you if you if you are part of the gig economy or take payments from Etsy, Facebook, PayPal, Venmo, etc. It is possible that you won’t get this form in the mail. You may need to log into an account or you may have received an email. If you don’t report this on your tax return, you may receive an IRS notice later including interest and penalties.
* Record of any estimated tax payments made
* W-2 (wages)
* 1099-INT (interest)
* 1099-DIV (dividends)
* 1099-B (proceeds from broker or barter transactions)
* 1099-R (pensions and IRA distributions)
* 1095 forms regarding insurance coverage (Affordable Care Act)
* Schedule K-1 forms - partnerships, S corporations, estates and trust, and other income reporting statements, including all copies provided from the payer
* Forms 1099-SSA or 1099-RRB for social security benefits received
* Form 1099-G for unemployment compensation
* Copy of the closing statement if you bought or sold real estate or refinanced
* Rent certificate if you will be claiming the Wisconsin Homestead Credit
* Form 1098-E for student loan interest paid
* Form 1098-T for tuition paid
* Form 1099-SA for health savings account distributions.
* Record of child care including amount paid and provider name, tax id number and address
* Mileage figures for any automobile expenses claimed, including total mileage, commuting mileage and business mileage
* Business and Rental - Income and deductions categorized on a separate sheet
* List of itemized deductions categorized for
	+ Medical expenses paid and any medical mileage
	+ Health insurance paid (out-of-pocket) including supplemental insurance
	+ Long-term care insurance paid
	+ Property taxes paid (include a copy of the property tax bill)
	+ Home mortgage interest paid
	+ Charitable contributions and any charitable mileage
	+ Other miscellaneous deductions
* Record of contributions to college education savings - Edvest or Tomorrow’s Scholar
* Record of any contributions to Roth or traditional IRA accounts
* Record of classroom expenses of teachers, counselors and principals (up to $300)

**We are offering a secure portal to electronically transfer documents. Do not email documents. Call 715.514.4190 or email** **margaret@banchycpa.com** **for information.**