



Remember that the sooner you file, the sooner you'll get your refund. To make the e-filing process quicker, gather your forms and documents before you begin. Below is a checklist of the basic forms and records you'll need to make your taxes happen fast!

Forms you'll need...

Personal information

This information tells the IRS who's filing, who is covered in your tax return, and where to deposit your tax refund. Don't skip these crucial first steps.

- Drivers license numbers and dates of birth for you, your spouse, your dependents
- Copies of last year's tax return for you and your spouse (not required)
- Bank account number and routing number, if you'd like your refund deposited directly into your account

Information about your income

- W-2 forms
- 1099-C forms for cancellation of debt
- 1099-G forms for unemployment income, or state or local tax refunds
- 1099-MISC forms for you and your spouse (for any independent contractor work)
- 1099-R, Form 8606 for payments/distributions from IRAs or retirement plans
- Business or farming income - profit/loss statement, capital equipment information
- 1099-INT, -DIV, -B, or K-1s for investment or interest income
- SSA-1099 for Social Security benefits received
- Prior year installment sale information - Forms 6252, principal and interest collected
- 1099-S forms for income from sale of a property
- Rental property income and expenses: P&L, suspended loss info
- Alimony
- Miscellaneous income: jury duty, gambling winnings, Medical Savings Account, scholarships, etc.

Adjustments to your income

The following items can help reduce the amount of your income that is taxed, which can increase your tax refund, or lower the amount you owe.

- Records of IRA contributions made during the year
- Form 1098-T for tuition paid (or receipts/canceled checks for tuition paid for post-high school)
- For teachers: Canceled checks or receipts for expenses paid for classroom supplies, etc.
- Moving expenses
- Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.)
- Records of Medical Savings Account (MSA) contributions
- Self-employed health insurance payment records
- Form 1098-E for student loan interest paid
- Alimony and Keogh, SEP, SIMPLE, and other self-employed pension plans

If you itemize your deductions:

Deductions, credits, childcare, education, etc.

Work with a ENH Tax & Accounting if you want to make the most of your returns this year! The deductions that follow will help you really maximize your returns.



- Child care costs: provider's name, address, tax ID, and amount paid
- Education costs: Form 1098-T, education expenses
- Adoption costs: SSN of child; records of legal, medical and transportation costs
- Forms 1098: Mortgage interest, private mortgage insurance (PMI), and points you paid
- Investment interest expenses
- Charitable donations
- Medical and dental expense records
- Casualty and theft losses: amount of damage, insurance reimbursements
- Records of home business expenses, home size/office size, home expenses
- Rental property income/expenses: profit/loss statement, rental property suspended loss info
- Records/amounts of other miscellaneous tax deductions
- Records/amounts of other miscellaneous tax deductions



GORDON & ASSOCIATES CPA, P.A.



"There are few things that give me more joy, than the smile of a happy client."