



# JONIE & CO

## Tax Return Documents Checklist 2018

Please checkmark and bring your income and deduction documents

### 1. Single Tax Payer

Must bring State ID

Social Security Card or ITIN

Bring your W2 Form

You can ask your employer for your W2 form.

### 2. Self Employed

Must bring State ID

Bring your 1099 Miscellaneous form

Must bring receipts or bank statements: this is your proof of income.

### 3. Home owner

Bring 1098 Mortgage Interest Statement

Property taxes form

House Expenses: 2-4 families house

If you have dependents or children

Social security card for each dependent

Birth certificates for each child

Doctor letter or school letter as proof of current address or place of residence

### 4. Students - College Students

State ID

Tuition Statement: form 1098-T

Student Loan Statement: form 1098-E

Receipts from school expenses

### 5. Other forms of income or Ownership or Assets may include:

Dividend returns from stocks

Recipient of social security benefits

Recipient of disability benefits

Retirement plans: form R

Gambling income: form W2G

Unemployment Compensation: form 1099-G

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