



Wagner Shields & Moini, LLP

The following is a list of forms you may receive from various companies, banks, and/or the government that pertain to your tax return and should be included in the information you gather for us. This list is general in nature and not all inclusive:

- W-2 Wage statement
- 1099 Miscellaneous
- 1099 R - IRA, Pension Income
- 1099 DIV - Dividend Income
- 1099 INT - Interest Income
- 1099 G - State Income tax refund/Unemployment Compensation
- 1099 B - Stock and Mutual bond sales and 12/31 year-end statement
- 1099 C or 1099 A - Cancellation of debt
- 1099-SA - Distributions from an HSA, MSA
- Real estate tax statement/tax card/tax bill
- Settlement statement on refinanced or purchased property (HUD1)
- Schedule of estimated taxes (federal & state) amount & date paid
- Child care - name of provider, identification number & amount paid
- Dependents - social security number, date of birth
- 1095-A, 1095-B, 1095-C and Insurance card for proof of insurance for NJ
- K-1's from partnership, S Corporation interest
- 1098 T - Tuition payment statement
- W-2 G - Certain gambling winnings
- Medical expenses (whether or not itemizing - May use in NJ)
- Charitable contributions (if itemizing)
- 1098 Mortgage interest statement
- Rental income and expenses
- Alimony payments or receipts
- Jury pay
- Sales tax for large ticket items such as an automobile or boat
- Form 1099 SSA - Social Security Benefits
- Receipts for classroom materials (for teachers)
- **BITCOIN (CRYPTOCURRENCY) PURCHASE/SALE INFORMATION**
- **Foreign accounts/income**
- NJ Sales tax not charged on online or out of state purchases
- Casualty losses/storm losses from a Federally declared disaster area

Business owners - please provide details of revenue and expenses for the year.

Rental property owners - please provide details of rent received and expenses per unit. Also, please let us know the extent of your personal use of the rental property, if any.

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