



On Point Tax & Accounting, LLC

This list is a guide to assist in gathering your tax data. Not every item on the list will apply to your particular situation. Any documents you receive that say "important tax document" should be included with your tax documentation.

Taxpayers who are eligible to claim the child tax credit, the earned income credit and the American Opportunity college credit or file as head of household will be required to provide additional documentation to support the due diligence required by the IRS. See Proof of Residency item listed below.

<b>Tax Data Source Document</b>	<b>Type of Form</b>
Wages/Compensation Statements	W-2 or 1099-NEC
Distributions from Pensions & Retirement Accounts	Form 1099-R
Social Security Income/Railroad Retirement Income	SSA-1099/RRB-1099
Health Insurance Marketplace Statement	Form 1095-A
Unemployment Income	Form 1099-G
State Refund Amount	Form 1099-G
Interest and Dividend Income	1099-INT or 1099-DIV
Brokerage Year End Tax Statement	Form 1099-B
Self-employed Business Income and Expenses	<b>SUMMARIZED</b>
Income and Expenses from Rentals	<b>SUMMARIZED</b>
Income from Partnerships, S Corporations, Trusts, and Estates	Schedule K-1
Mortgage and/or Home Equity Loan Interest Paid	Form 1098
Student Loan Interest	Form 1098E
Tuition Statements	Form 1098T
Withdrawals from 529 College Plans	Form 1099-Q
Lottery or Gambling Winnings and Losses	W-2G

**Other Items of Note:**

- Proof of Residency for All Dependents (medical record, school record or mail showing dependent name and home address that is dated in 2023)
- Records of Purchase, Sale or Refinance of a House (Closing Disclosure/Settlement Package)
- Medical and Dental Expenses (**SUMMARIZED ONLY** - DO NOT PROVIDE MEDICAL RECEIPTS)
- Real Estate and Personal Property Taxes (if not on mortgage statement)
- Estimated Tax Payments - List of payments by date & amount & if Federal or State
- Cash and Non-Cash Charitable Donations
- Childcare Expenses and Provider Information (Provider Info, ID#, and Total \$ Paid for Year **PER CHILD**)
- Alimony - Amount Paid or Amount Received + Date of Divorce Decree
- Receipts for Energy Efficient Improvements purchased in 2023
- Unreimbursed Employment Related Expenses (**PA ONLY**)