

MAIN STREET TAX & ACCOUNTING SERVICES, INC.
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It is very difficult to list all income and expense sources. We hope the following limited list will help you gather the necessary information needed for us to complete your income tax returns. Please bring with you all the necessary information, which applies to you:

Some Sources of Income:

- If applicable, Form 1095A. Go to www.healthcare.gov for your form.**
- W-2 Forms and Unreported Tip Income – Wages
- Retirement Income including Social Security Income
- 1099 - Interest Forms (**including tax-exempt income**) - 1099INT
- 1099 - Dividends Forms (**including tax-exempt income**) - 1099DIV
 - **Please include your 12/31 full year annual statements.**
- All 1099 forms including 1099A, 1099C, 1099G, 1099NEC, 1099MISC, etc.
- Business Income (identified by source, i.e., business income, loans, gifts, etc.)
- Farm Income (identified by source, i.e., business income, loans, gifts, etc.)
- Sale of Stocks (Form 1099B), real estate (Form 1099S), personal property, or business property. **Purchases & sale dates and amounts will be needed.**
- IRA, Pension, Annuity Distributions, and IRA Rollover information
- Rental and Royalty Income (identified by source, i.e., business income, loans, gifts, etc.)
- Partnership & S Corporation Income (Form K-1)
- Estate Income (Form K-1)
- Unemployment Income – Form 1099G
- Alimony Income old law
- Gambling/Lottery/Prize Winnings
- Jury Duty Pay
- Hobby Income
- Other Income not listed above

Partial List of Possible Deductions or Credits (must be paid in the tax year)

- Medical Expenses
- Medical Mileage
- Health Insurance Premiums, Medical Savings Accounts
- Real Estate Taxes
- Home Mortgage Interest
- Equity Loan Interest
- Investment Interest
- Charitable Contributions
- Casualty Losses
- IRA Contributions (Traditional IRA Contributions and Roth IRA Contributions)
- Union and Professional Dues
- Tools, Supplies and Equipment used at your job and required by your employer – need receipts
- Business miles for your employer's purpose
- Gambling Losses (PA purpose)
- Hobby Expenses (PA purpose)
- Uniforms purchased and cleaning (PA purpose)
- Business Expenses (categorized)
- Farm Expenses (categorized)
- Rental Expenses (categorized)
- Child Care Cost - Day Care Name, Address, SS#, Amount Paid
- Qualified Tuition Expenses (Higher Education Costs) (include quarterly statements from college)
- Qualified Adoption Expenses
- Qualified Student Loan Interest
- Federal, State and Local estimated income tax payments by date and amount.
- Other deductions not listed above