

Income

- W-2s –**

- Bank interest 1099-INTs –**

- Stock dividend 1099-DIVs –**

- 1099G for state/local income tax refund –**
- Miscellaneous income –**

Expenses

- Mortgage interest statement –**
- Real estate tax statement –**
- Student loan interest paid –**
- Gifts to charity –**

- Education expenses –**

- Child care expenses –**
- Miscellaneous expenses –**