

**MEDICAL INSURANCE**

Insurance Cost \_\_\_\_\_  
Marketplace **bring Form 1095-A** \_\_\_\_\_  
Long-Term/Nursing Home Insurance \_\_\_\_\_

**CONTRIBUTIONS**

Receipted Church, Charity \_\_\_\_\_  
Non-Cash over \$500 itemize \_\_\_\_\_

**MISCELLANEOUS**

College Tuition Fees **bring Form 1098-T** \_\_\_\_\_  
College Savings Plan \_\_\_\_\_  
Montana Medical Savings (extended) \_\_\_\_\_  
Federal HSA **bring distribution form** \_\_\_\_\_  
Adoption Expense \_\_\_\_\_  
Storm Doors, Windows \_\_\_\_\_  
Furnace, AC, Hot Water Heater \_\_\_\_\_  
Insulation \_\_\_\_\_  
Geothermal, Wind Turbines, Biomass Fuel Stove or Solar \_\_\_\_\_  
IRA or ROTH Rollover **bring Form 1099-R** \_\_\_\_\_  
Sale of Land or Stock **bring Closing papers or Form 1099-B** \_\_\_\_\_  
Student Loan Interest \_\_\_\_\_  
Electric Vehicle Credit **bring papers** \_\_\_\_\_

**UNREIMBURSED MEDICAL**

Prescriptions \_\_\_\_\_  
Doctors, Dentist \_\_\_\_\_  
Glasses, Contacts, Orthro \_\_\_\_\_  
Laser Eye Surgery \_\_\_\_\_  
Medical Travel (Hotel & Air) \_\_\_\_\_  
Medical Mileage \_\_\_\_\_

**CHILDCARE**

Sitter's Name \_\_\_\_\_  
Address \_\_\_\_\_  
SS# or EIN# \_\_\_\_\_  
Amount Paid \_\_\_\_\_  
Sitter's Name \_\_\_\_\_  
Address \_\_\_\_\_  
SS# or EIN# \_\_\_\_\_  
Amount paid \_\_\_\_\_

**AGE 62 & OVER**

Social Security **bring Form SSA-1099** \_\_\_\_\_  
Rent paid **bring receipts** \_\_\_\_\_  
Roommate Income \_\_\_\_\_  
Non-taxable Pensions \_\_\_\_\_  
Property Tax paid **bring November bill** \_\_\_\_\_

**HOME PURCHASE OR IMPROVEMENT INTEREST**

1<sup>st</sup> /2<sup>nd</sup> Home or 2<sup>nd</sup> Mortgage \_\_\_\_\_  
Refinance **bring closing papers** \_\_\_\_\_  
Sale or Purchase of Residence **bring Form 1099-S or Settlement Papers** \_\_\_\_\_

**DIGITAL/ASSETS INCOME**

Crypto Currency, Barter or Shared Economy Income \_\_\_\_\_  
Venmo/Square or other Platform Income \_\_\_\_\_  
Uber/Door Dash \_\_\_\_\_  
**Form 1099-B from financial company (i.e., Robinhood).**  
**Form 1099-K from other income producing platforms.**

**TAXES**

Home, Land or Cabin \_\_\_\_\_  
Vehicle **bring slips** \_\_\_\_\_  
Back Year State or Federal taxes paid \_\_\_\_\_

**ONLINE SALES**

eBay, Craigslist or Marcaria \_\_\_\_\_  
**Form 1099-K or Income summary from your online account**