

## Reminder List of Commonly Needed Items

- ✓ W-2's, Pension/IRA forms 1099-R
- ✓ Interest & Dividend Statements
- ✓ Unemployment Form 1099-G
- ✓ Social Security Income
- ✓ Mortgage Interest
- ✓ Cost of vehicle plates
- ✓ Property Taxes (Summer & Winter)
- ✓ Marketplace Insurance Form 1095 A
- ✓ Donations (cash & value of non- cash)
- ✓ Changes in dependents or address
- ✓ Child Support/ Alimony Received
- ✓ Child Care Statements
- ✓ College Tuition, books & supplies
- ✓ Voided check for Direct Deposit
- ✓ Student Loan Interest

### Some of What Is New For 2022

**Inflation Reduction Act of 2022** –Let us know if you've made energy-efficient improvements to your main home. Additionally the purchase of a used clean vehicle or new electric vehicle may be eligible for a tax credit. Please include paperwork with your tax documents.

**Student Loan Debt Forgiveness** – Most student loan debt forgiven in between 2021 through 2025 will be tax-free.