

V & R Accounting, Inc
130 N 8th St
Quincy IL 62301
217-222-6568



V & R Accounting, Inc
2805 N Center
Maryville, IL 62062
618-288-4477

CHECKLIST FOR TAX DATA

1. All copies of W-2s, 1099s, and K-1 reporting income to you.
2. All 1098s from banks and savings and loans where you have paid interest
3. All 1099 forms reporting sale of stocks or real estate.
4. Any Virtual Currency sales or dispositions during 2022.
5. 1099 forms reporting unemployment compensation.
6. 1099-SSA forms reporting Social Security received and 1099-R for other retirement distributions.
7. 1098-T forms: This form reports tuition paid during the year. If you did not receive this form - get your student's username and password and we can log onto the school website and get this information.
8. If you believe you will be able to itemize your deductions, please bring the following:
 - a. Property tax bill
 - b. Medical expenses including health insurance
 - c. Charitable contributions
 - d. Mortgage interest
 - e. Sales Tax paid on automobiles or boats
9. Record of estimated tax payments made this year.
10. Form 1095-A from the healthcare.gov exchange if you purchased your health insurance from the marketplace.
11. If you purchased a piece of equipment for your business, please provide the bill of sale.