



GREATWAYS TAX SERVICE, INC.

Great Service @ Right Ways, Since 2002

Income Information

- Form W-2: These are issued by employers and show your wages and tax withholdings. They are supposed to be mailed by January 31.
- Form 1099-NEC: These report income you have received as an independent contractor or freelancer. You should receive one from each person or company that pays you.
- Form 1099-INT: This form will show any interest you have earned.
- Form 1099-R: This form reports income received from annuities, IRAs, or pensions.
- Form 1099-DIV: Any dividend income you earn is reported on this form.
- Form 1099-B or 1099-S: You will receive these if you have any income from the sale of property or stock.
- Schedule K-1 (Form 1065, Form 1120S, or Form 1041): This reports income for a partner, a shareholder, or an income beneficiary of an estate or trust. The Schedule K-1 normal deadline can be as late as March 15

Income-Reduction Documents

- Form 1098-E for student loan interest paid, or loan statements for student loans received
- Form 1098-T for tuition paid or receipts from the institution you or your dependents attend
- Receipts for any qualifying energy-efficient home improvements
- Records of IRA contributions made during the year
- SEP, SIMPLE, and other self-employed pension plan information
- Records of medical savings account (MSA) contributions

Personal Information

- Social Security numbers and birth dates

Pramod Zacharias EA | Elangovan Kodinathan EA

1001 E. Chicago Ave, Ste. 151, Naperville, IL 60540

Ph: 630-663-1500 | Fax: 630-388-5663

tax@greatwaysinc.com

www.greatwaysinc.com



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- Copies of last year's tax return (If you didn't file last year with Greatways)

- Bank account number and routing number,

Deductions And Credits

- Childcare costs: provider's name, address, tax ID, and the amount paid
- Education costs: Form 1098-T, education expenses
- Adoption costs: SSN of the child; records of legal, medical, and transportation costs
- Form 1098: Mortgage interest, private mortgage insurance (PMI), and points you paid
- Investment interest expenses
- Charitable donations: cash amounts and official charity receipts
- Medical and dental expenses paid
- Casualty and theft losses: the amount of damage, insurance reimbursements
- Records/amounts of other miscellaneous tax deductions: union dues; unreimbursed employee expenses (uniforms, supplies, seminars, continuing education, publications, travel, etc.)
- Records of home business expenses
- 529 Contribution Details (Plan Name, Account number and the amount per account)

Taxes Paid

- State and local income tax
- Real estate tax
- Personal property tax

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