



METROPOLITAN INCOME TAX & BOOKKEEPING

ITEMS TO BRING TO YOUR APPOINTMENT (AS IT PERTAINS TO YOU)

CHECKLIST ITEM	TAX FORM
○ JOB WAGES	W2's
○ MORTGAGE STATEMENT	1098
○ TUITION STATEMENT	1098-T
○ NON-EMPLOYEE COMPENSATION (<i>SELF-EMPLOYMENT INCOME</i>)	1099-MISC
○ IF A DEBT HAS BEEN SETTLED WITHIN THE TAX YEAR	1099-C
○ EARLY DISTRIBUTION- IRA/401K/INSURANCE	1099-R
○ UNEMPLOYMENT COMPENSATION	1099-G
○ GAMBLING WINNINGS	W2-G
○ SOCIAL SECURITY BENEFITS (<i>IF OTHER INCOME INCLUDED</i>)	1099-SSA
○ INTEREST INCOME & DIVIDEND INCOME	1099-INT
○ HSA Health Savings Account	1099-SA
○ HEALTH INSURANCE	1095
○ INTEREST/DIVIDEND EARNED (<i>\$10.00 - \$600.00 MIN.</i>)	1099-DIV
○ ITEMIZING (<i>SCHEDULES</i>)	ORGANIZERS