

2017 Tax-Related Forms and Documentation

January is right around the corner, and you may be wondering what forms your preparer will need to complete your tax returns. Below is a list of documents you can expect, along with their anticipated delivery dates. After the end of the year, you may also receive letters from charities confirming your 2017 donations. Keep these with all of your other tax information.

If you had...	You'll receive Form...	Around...
Wages from a job	W-2	January 31
Unemployment income	1099-G	January 31
Social Security income	1099-SSA	January 31
Interest from bank accounts	1099-INT	January 31
Dividends from stock you own	1099-DIV	January 31
Rental Income	1099-MISC	February 15
Income or loss from selling stock	1099-B	February 15
A sale of your home	1099-S	February 15
A distribution from a retirement account	1099-R	January 31
Income from a partnership or S corporation	Schedule K-1	March 15
Income from an estate	Schedule K-1	April 18
Cancellation of debt	1099-C	January 31
An HSA	1099-SA	January 31
Student loan payments	1098-E	January 31
Mortgage payments	1098	January 31
Tuition expenses	1098-T	January 31
Distributions from tuition plans	1099-Q	January 31
Health insurance from the marketplace	1095-A	January 31
Health insurance through a job	1095-B or 1095-C	January 31



Important Tax Dates & Information

If you were affected by Hurricanes Harvey, Irma, or Maria and extended your taxes, they are due on January 31, 2018. You also have until January 31, 2018, to pay estimated taxes that were originally due on September 15, 2017, and January 15, 2018.

If you were affected by the wildfires in northern California, you have until January 31, 2018, to file individual tax returns on extension. You also have until January 31, 2018, to pay estimated taxes that were originally due on January 15, 2018.

For more information, contact me or visit the "Tax Relief in Disaster Situations" webpage on www.irs.gov.

Did You Know?

In the 2016 filing season, the IRS processed over 150 million individual income tax returns, with a total income tax after credits of \$1,416,834,888.

Quote Corner

"It's chaos. Be kind."

~Michelle E. McNamara