

Forms and Description	Forms You May Receive	Do you Need	
		Y	N
Main Federal Forms			
1040 Long Form			
1040A Short Form			
1040EZ			
Income and Deduction Forms			
Schedule A Itemized Deduction <i>(This form is used to claim deductions for home mortgage interest, property or income taxes, casualty losses, gifts to charity, employee business expenses or gambling losses. Also, you can itemize your Oregon return even if you do not have enough deductions for your federal return.)</i>	1098 Mortgage interest paid statement		
Schedule B Interest & Dividend <i>(Interest or Dividend income greater than \$1500)</i>	1099-Int Or 1099-Div		
W-2 Wages & Withholding Summary	W-2 from employer		
Schedule D Capital Gains & Losses <i>(If you sold stocks, bonds, rental property, investment property you must file this form.)</i>	1099-B or 1099-S		
Schedule E Rental Income & Loss <i>(Must be filed to claim all income and deductions for a rental property)</i>	1099- MISC rental receipt		
Schedule E pg2 - K1 <i>(If you are an owner or beneficiary of a Partnership, S-Corporation, Trust or Estate, you should receive Schedule K-1 to report your share of income, deduction, etc. K-1 information pass to your Form 1040)</i>	K-1 from Partnership, S-Corporation, Trust or Estate		
2106 Employee Business Exp <i>(Must be filed with Schedule A. If you have unreimbursed business expenses for trave, business equipment, etc.)</i>	W-2 from employer		
2441 Child & Dependent Care <i>(Did you have childcare expenses so you could work or go to school)</i>			
3909 Moving Expense <i>(If you moved more than 50 miles away for another job)</i>			
Schedule L <i>(Property taxes paid, but not able to file Schedule A)</i>			
3800 Children Under Age 14 Investment Inc			
8889 Health Saving Account			
6252 Installment Sale Income			
8283 Non Cash Charitable Contribution <i>Non-Cash donations to charity valued at more than \$500</i>			
8814 Parents Election Child Int & Div			
Credits			
Schedule EIC Earned Income Credit <i>(Child(ren) live with you and less than \$48,000 income)</i>			
5405 First-Time Homebuyer Credit <i>(If you bought a new home and you have not owned a home within 3 years of purchasing your new home, you may qualify for this credit.)</i>			
5695 Residential Energy Credit <i>(If you installed new energy efficient windows, doors, insulation, solar water heater, on demand hot water heater, metal roof, fuel cell device or high-efficiency furnace or heat pump you may qualify for this credit)</i>			
Schedule M Making Work Pay & Credit <i>(Worked and made less than \$98,000 single and \$190,000 married)</i>			
8812 Additional Child Tax Credit <i>(Child(ren) under 17 and not able to claim all Child Tax Credit)</i>			
8863 Education Credits <i>(Did you pay for higher education for you, your spouse or dependents)</i>	1098-T		

8910 Hybrid Car Credit <i>(Did you purchase a Hybrid car in 2010)</i>			
8880 Retirement Savings Credit <i>(Earned less than \$50,000 and contributed to a retirement savings plan)</i>	1099-R		
Self employed Business Forms			
Schedule C Sole Proprietorship <i>(If you have a net profit from your business you must also file Schedule SE. If you purchased equipment or furniture you must also attach Form 4562 to your return).</i>	1099-MISC		
Schedule C-EZ <i>(If you are self employed and your business expenses are less than \$2500 you may qualify to use this short form instead of the full Schedule C.)</i>	1099-MISC		
4562 Depreciation & Amortization <i>(Was a new asset, such as a computer or automobile, placed in service in your business or rental property)</i>			
4797 Sale of Business Property <i>(This form is required if you sold rental property, business use car, or other business assets. It is likely Schedule D may also be required if you file this form)</i>	1099-S		
8829 Business Use of Home <i>(Was a part of your home used for exclusive use for your business)</i>			
8582 Passive Activity Loss <i>(May need to be filed is there is a loss on business or property that was not actively managed by you)</i>			
Schedule SE Self-Employment Tax <i>(Must be filed with a net profit from your sole proprietor business)</i>			
Other			
1040X Amended US Individual <i>(If more information was obtained from past years return that would change your refund or balance due for that year)</i>	Past federal or state tax return		
2210 Underpayment Estimated Tax <i>(If you owe more than \$1,000 when you file your return, or if you made estimated tax payments, you may need to file this form)</i>			
5329 Early Withdrawal Penalty <i>(If you took an early withdrawal from any IRA or pension plan, you may be required to file this form.)</i>			
8615 Kiddie Tax <i>(If you are child under age 18 with more than \$1,600 of investment income, you may need to file this form)</i>			
Take Insight Tax Preparation Charges out of Refund <i>(Do you want to pay my fees out of your refund)</i>			
State Returns			
Oregon 40			
Oregon Schedule ASC <i>(This form is required if you claim multiple credits, additions or subtractions on your Oregon return).</i>			
Self Employed LTD Tax			
WFC Oregon Working Family Childcare Credit <i>(If you are low income and you paid for child care so you could go to work or school)</i>			
Out of State Returns <i>(Do you have returns other than Oregon that needs to be prepared)</i>			