

## What Tax Documents do I need to complete my Taxes?

**These tax forms listed may or may not apply to your tax situation**

### **Income Documents**

W-2 - from your employer or whomever employed you for the current filing year.  
1099-R - Distribution from a retirement account  
1099-Misc/NEC  
1099-SSA- Social security income  
1099-G Unemployment Income /Paid family Leave/Gamliing Winnings

### **Bank/ Financial Documents**

1099-INT , Bank or investment Interest  
1099-DIV Issued by your financial institution. For example, Schwab, Franklin Templeton  
1099-B Issued by your financial institution for stocks sales  
1099-S Sale of a home residence or a rental property that yo

### **Misc. Forms that may apply to you**

1099-E Student Loan Interest  
1098-T Tuition Statement, paid for a child you claim or taxpayer or spouse

### **Forms if you Itemize**

1098-Mortgage Interest form (property tax paid may be on this document if included in your house payment)  
Car Registration, boat registration, RV registration, Sea Doo registration, etc.

### **Misc. Items to tell us about**

Child Care paid & who paid to  
Donated clothing & misc. Good to Goodwill , etc.  
Cash donations to church or any other nonprofit, Go Fund Me, etc.

### **Medical**

1095-A- Proof of Medical Coverage from the Exchange  
1095-B - Proof of Medical from your employer  
1095-C - Proof of Medical to show covered on your own and Medicare/Medicaid

**Rental Deduction worksheet** Please see our website for that checklist.