

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/gambling winnings

Bank/Financial Documents

1099-INT - Bank or investment interest
1099-DIV - Issued by your financial institution. 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 you own

Misc. Forms That May Apply To You

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

Forms If You Itemize

1098 - Mortgage Interest form (property tax paid may be on this document if included in your house payment
Car/Boat/RV Registration
Sea Doo Registration

Misc. Things To Tell Us About

Child care costs (Who paid, who was paid, and how much?)
Donated clothing & misc. items (Such as goodwill donations, etc.)
Cash donations to any nonprofit (Such as a church or a GoFundMe, etc.)

Medical

1095-A - Proof of medical coverage from the exchange
1095-B - Proof of medical coverage from your employer
1095-C - Proof of medical coverage from Medical/Medicaid or covered on your own

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