

TAX DOCUMENTS NEEDED

INCOME

- W-2's – Wage Statement
- W-2G – Gambling Income
- 1099 Misc - Income
- 1099 Int – Interest
- 1099 Div – Dividend Statement
- 1099B – Brokerage Statement
- 1099 R – IRA, 401k or Pension Income or Rollover
- SSA 1099 – Social Security Income
- RRB 1099 – Railroad Tier 1 or 2 Income
- 1099G – Unemployment Income
- 1099G – State Refunds
- K-1's – Income from other entities
- Record of income & expenses for your rental property
- Record of income & expenses for your self-employment
- Record of income and expenses for your farming operation

OTHER

- 1098 Mortgage statement
- 8889 – Health savings account statement (contributions & withdraws)
- 1095A – Marketplace health insurance statement
- 1098T – Tuition statement
- Bit Currency Transactions
- Home or Property Refinance Documents
- 1099C
- 1099K
- Daycare Provider Information
- Student Loan Interest Paid
- 529 Contribution
- Traditional IRA Contribution
- Roth IRA contribution
- Any documents provided to the Internal Revenue Service for this tax year
- Driver's License
- Bank Routing and Account Number