

# TAX DOCUMENTS NEEDED

INCOME
• W-2's – Wage Statement
• Last Paystub if claiming overtime credit.
• 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

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
• Voided Check
• <b>New Clients</b> - Copy of your Social Security Card