Tax Preparation Checklist of Tax Documents and Other Items

Regular, Retirement and Miscellaneous Income

W-2 wages, Gambling or Other Prize Winnings

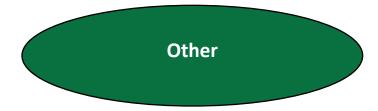
1099 Non-employee Compensation, Miscellaneous Income, Unemployment Compensation, Interest Income, Dividend Income, Debt Forgiveness, 401K Distributions, Pensions, Annuities, IRA's and Social Security

Most Common 1099's:

- 1. 1099-NEC, Nonemployee Compensation
- 2. 1099-MISC, Miscellaneous Income
- 3. 1099-INT, Interest Income
- 4. 1099-DIV, Dividends and Distributions
- 5. 1099-G, Certain Government Payments (includes unemployment)
- 6. 1099-B, Proceeds From Broker and Barter Exchange Transactions (includes Stock Sales)
- 7. 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs
- 8. 1099-C, Cancellation of Debt
- 9. SSA-1099, Social Security Benefit Statement



1098 Mortgage Interest (1098), Tuition Statement (1098-T) and Student Loan Interest (1098-E). These are the most common



1095 Health Insurance Statement

Most Common 1095's:

- 1. 1095-A, Health Insurance Marketplace
- 2. 1095-B, Verification of Health Insurance Coverage
- 3. 1095-C, Employer Provided Health Insurance