

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

Expenses

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

Other

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