

TYPICAL YEAR END DOCUMENTS FOR TAX PREP

FORM	FOR WHAT	FORM	FOR WHAT
W-2	Wages	1099-NEC	Non-Employee Income
SSA-1099	Social Security Income	1099-K	Merchant Income
1099-INT	Interest Income	1098's	Mortgage Interest Paid
1099-DIV	Dividend Income	1098-T	Tuition Paid
1099-B	Brokerage Reporting	Sched K-1 1120S	from S Corps
1099-G	State Refunds & Unemployment	Sched K-1 1065	from Partnerships
1099-R	Retirement Distributions	Sched K-1 1041	from Trusts
1099-MISC	Miscellaneous Income	1099-SA	HSA Distributions
W-2G	Gambling Winnings	5498-SA	HSA Contributions
1098-E	Student Loan Interest Paid	5498's	IRA Values & Contributions

- _____ Medical Expense Totals (I don't total those for you)
- _____ Child Care costs and Statements from Care Providers
- _____ Due Diligence Questionnaire for Dependent Credits
- _____ Charitable Donation Receipts
- _____ AZ State Tax Credit Donation Receipts
- _____ If not already included, a statement with your child's name and your address on it
- _____ Bursar Report or College Statement showing actual payments for college classes
- _____ Estimated Tax Payments with amounts and dates paid
- _____ Any letters received from the IRS or State Tax Agencies
- _____ Healthcare Provider Statements **1095 (A, B, or C)** Good for showing proof of dependents!
- _____ My current year's Engagement Letter