

Documents and Information needed when filing your taxes

(This is a list of the most used documents, you may not have all of them are others not listed here that you may need depending on your individual situation)

Income Statements

- W-2 (Wage statements)
- SSA-1099 (Social Security Benefit Statement)
- 1099R (Pension, IRA and other retirement income statements)
- 1099 INT (Interest income statements)
- 1099 DIV (Dividend income statements)
- 1099 G (Unemployment or state refund statements)
- 1099 W2G (Gambling winnings statements)
- 1099B (Proceeds from Stocks, Bonds and Mutual Fund Sales)
- 1099-MISC (Non-Employee Compensation, Rends, Royalties, Other Income)
- 1099S (Sale of home or real estate)
- K-1 (Income from Partnership, LLC, S or C-Corp, Trust or Estate)

Other Reportable Income (not on a statement)

- Alimony Received
- Scholarship (Grants)
- Unreported Tips
- Director/Executor Fee
- Jury Duty
- Payments from Prior Installment Sale