

INCOME DOCUMENTS CHECKLIST

All income sources must be included — not just the main job.

Form Type	Description	Qty
W-2	From all employers	
1099-NEC	Self-employed, contractor, or gig income	
1099-MISC	Rental income, prizes, or other payments	
1099-K	Payments via PayPal, Cash App, Stripe, etc.	
1099-G	Unemployment benefits or state refunds	
1099-R	Retirement income or pension	
SSA-1099	Social Security benefits	
1099-INT / 1099-DIV	Bank interest or dividends	
Schedule K-1	Partnerships, S-corps, trusts	
Other Income	Tips, cash jobs, crypto transactions, side hustles	