

# 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 |     |