



Common Forms and Documents Needed When Filing Taxes

Below is a list of commonly filed forms you may either get in the mail or you will need to retrieve online. Please upload all the applicable forms.

- Current Driver's License
- Direct Deposit or Payment info (Routing, Account and Type {Checking/Saving})
- W2 for the first, second and third wage earning job (even if you worked a few weeks)
- 1099-R if you took/received a distribution from a retirement account
- 1099-C for if you had a cancellation of debt
- W-2G for if you had gambling winnings
- 1099-G for if you received a state refund (you may have to go online to get this)
- 1099-G for if you received Unemployment Compensation even if Covid Related (you may have to go online to get this)
- 1099-NEC for the independent contractor job (Uber/Lyft, door dash, etc.)
- 1099-MISC if you received other income (box 3).
- 1095-A for if you had Health Insurance from the Marketplace (www.healthcare.gov)
- 1098-Mtg Statement (including Settlement Sheet if sold or purchased a home)
- 1099-INT for interest earned on bank accounts (if you are a baller like that)
- 1099-DIV for dividends earned on stocks you owned

- 1099-B for stocks or bonds acquired or sold (your broker may have this available in mid-February)
- SSA-1099 for Social Security Benefits
- 1098-T if you or a dependent took college courses (you can retrieve this from the online student account)
- 1099-Q for 529 Plan Distributions
- 5498-SA HSA Contributions
- 1099-SA HSA Distributions
- 1098-E Student Loan Interest (you may need to go online to get this)
- 1099-K Uber/Lyft Statement (check the app for year-end tax docs)
- 5498 IRA Contributions/Distributions
- Profit and Loss Statement for your business
- Real Estate Sales
- HUD-1/Settlement Sheet
- Jury Duty
- Prizes/Awards
- Self Employed Income and Expenses
- Rental Income and Expenses
- Union Dues
- Charitable Contributions (cash and non-cash) (Includes Church Tithes)
- Alimony paid or received
- Inheritance Documents
- Identity Protection PIN
- Child Care Provider Information

Please do not hesitate to contact me if you have any questions or concerns.

656-242-9741