

# Your Essential Tax Documents Checklist

Tax season can feel overwhelming, but proper preparation can make the process much smoother. This checklist can help you gather necessary forms and records during tax season. Please gather and provide the checked items below to your tax provider for processing.

## **○ Forms W-2: Wage and Tax Statement**

Employers issue **Forms W-2** to employees, summarizing earnings and tax withholdings.

## **Forms 1099: Reporting Non-Wage Income**

Several types of **Forms 1099** report various income sources beyond wages.

- 1099-INT (Interest Income)
- 1099-DIV (Dividends & Capital Gains Distributions)
- 1099-MISC (Rents, Royalties, & Miscellaneous Income)
- 1099-NEC (Nonemployee Compensation)
- 1099-B (Stock & Investment Sales)
- 1099-S (Real Estate Transactions)
- 1099-G (Unemployment & State Tax Refunds)
- 1099-R (Retirement Distributions)

## **Forms 1098: Reporting Deductible Expenses**

- 1098 (Mortgage Interest Statement)
- 1098-E (Student Loan Interest Statement)
- 1098-T (Tuition Statement)

## **Tax-Deductible Expense Records**

- Mortgage Interest (Reported on Form 1098)
- State and Local Taxes (SALT Deductions)
- Medical Expenses (Exceeding 7.5% of AGI)
- Charitable Contributions (With Receipts)
- Student Loan Interest
- Job-Related Expenses

## **Healthcare Forms: Proof of Insurance Coverage**

If you had health insurance in the prior year, one of the following forms will serve as proof.

- 1095-A (Marketplace Insurance Statement)
- 1095-B (Health Coverage Statement)
- 1095-C (Employer-Provided Health Coverage Statement)

## **Identifying Information**

You'll need each of the following pieces of information to get your taxes done:

- Social Security Number (SSN) or Taxpayer Identification Number (TIN)  
Tax preparer: discuss new social security requirements on certain OB3 deductions. See [page two](#) for more information.
- Previous Year's Tax Return (For Reference & E-Filing Identity Verification)
- Bank Account Information (For Direct Deposit of Refunds)
- Identity Protection PIN (IP PIN) (If Assigned by the IRS for Fraud Protection)

## **More information needed:**

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