**Possible Tax Documents You May Receive**

**This list is a collaboration of all forms and information that may be used when filing a tax return. Please note that you will not have every form on this list****. The forms you receive are based on your individual financial situation.**

Estimated Payment Information (1040V/state payments)

W2 (employee income)

W2c

1099-INT (interest income)

1099-DIV (dividend income)

1099 Consolidated (combined 1099 forms, i.e., interest income, dividends, digital assets, and stock sales)

Unemployment Compensation

1099-G (state income tax refunds)

1099-C (cancellation of debt)

W2-G (Gambling winnings)

1099-R (retirement distributions)

1099-S

1099-SSA (social security statements)

1099-MISC (miscellaneous income)

1099-NEC

Retirement Contributions

Schedule C income and Schedule C expenses, including 1099-K if using credit card processor

Home Office Information

Rental Income and Rental Expenses

Farm Income and Farm Expenses

Farm Rental Income and Farm Rental Expenses

K-1s from 1065, 1120S, 1041

Sale, purchase, or refinance of Personal Residence Information (Closing documents)

Installment Sale Information

Miscellaneous Sale Information

Educator Expenses

1098-E (student loan interest)

1098-T (tuition/fees)

1099-Q (529 or Coverdell tuition savings)

529 Contribution Statement

For Itemized Deductions:

 Medical Expenses, including mileage

 Real Estate Taxes

 Personal Property Taxes

 Vehicle/Boat/RV Purchase Information

 1098 Mortgage Interest

 Charitable Contributions (Cash, Non-cash, mileage)

 Gambling Losses

 Casualty Loss information

1095-A, 1095-B, 1095-C (Affordable Care Act forms)

5498-SA, 1099-SA (Health Savings Account forms)

Clergy/Ministers

Child Care Expenses (Need EIN & cost per child)

Residential Energy Credit Information

Adoption Expenses