



Tax Documents List

- W2 from your employer(s)
- 1099-INT from your financial institution(s)
- 1099-DIV from your financial institution(s)
- 1099-R from your pension or retirement provider(s)
- 1099-NEC or 1099-MISC from your other income sources
- 1099-G from the government (unemployment/family leave compensation or state tax refund)
- Consolidated 1099 or 1099-B from your broker or barter transaction(s)
- Income and expenses for your business(es) - [complete Schedule C worksheet](#)
- Your rental income and expenses - [complete rental income/expense worksheet](#)
- K1 from your pass-through entities
- Student loan interest form 1098-E from your student loan servicer(s)
- Mortgage interest statement from your bank or mortgage lender
- Health/medical savings distribution form, from your bank or financial institution
- W2G from gambling winnings
- SSA-1099 from Social Security Administration
- RRB-1099 from US Railroad Retirement Board
- 1099-Q from qualified education program(s)
- Letter 6419, for the 2021 Advance Child Tax Credit
- Your farm income and expenses
- Tuition statement from your college or post-secondary education institution(s)
- 1095-A from Health Insurance Marketplace
- DMV vehicle registration renewal with license fee for any vehicles you own
- For non-cash charitable donations totaling more than \$500:
 - Charity where the items were donated
 - Date items were donated
 - Description of items donated
 - How the item(s) were obtained (i.e., purchase, gift, won in raffle, etc.)
 - Date items were obtained
 - Value of items when obtained
 - Date of donation

**Several of these documents may not apply to you. Likewise, there may be relevant documents you have received that are not on this list. Please reach out to us if you have any questions about your specific situation.*