



### Key Income Forms

These forms are provided by employers, banks, and other institutions by the end of January or mid-February.

- Form W-2:** From each employer, showing wages earned and taxes withheld.
- Form W-2G:** For any gambling or lottery winnings.
- Form 1099-INT:** For interest income from banks or investments.
- Form 1099-DIV:** For dividends and distributions from investments.
- Form 1099-NEC:** For non-employee compensation if you worked as a freelancer or independent contractor.
- Form 1099-K:** For payments received via third-party networks like Venmo, PayPal, or online marketplaces.
- Form 1099-G:** For government payments like unemployment benefits or state tax refunds.
- Form 1099-R:** For distributions received from retirement plans, pensions, or annuities.
- Form SSA-1099:** For Social Security benefits received.
- Form 1095-A:** If they enrolled in a health insurance plan through the Health Insurance Marketplace.
- Schedules K-1:** For income from partnerships, S-corporations, estates, or trusts.

### Documents for Deductions and Credits

Relevant receipts and statements are needed to claim specific tax breaks.

- Form 1098:** For mortgage interest paid on your home or a rental.
- Form 1098-E:** For student loan interest paid.
- Form 1098-T:** For tuition expenses paid to an educational institution.
- Charitable Records:** Receipts for both cash and non-cash donations.
- Medical Expenses:** Records of medical/dental costs and health insurance premiums paid out-of-pocket.
- Childcare Records:** Documentation of expenses, including the provider's name, address, and tax ID (SSN or EIN).
- Estimated Tax Payments:** Records of any quarterly payments made for Form 1040-ES and Form 540-ES.

### Personal Information Needed

Beyond income and expense forms, you will need basic personal information:

- SSN or TIN:** For yourself, your spouse, and all dependents.
- Dates of Birth:** For everyone listed on the return.
- Identity Protection PIN (IP PIN):** If the IRS has issued one to protect against identity theft.
- Banking Details:** Your account and routing numbers for direct deposit.

### Additional Information: