



Common Income-related Tax Documents Checklist

You can use the checklist below to track the common documents you need in order to prepare your taxes. You may need additional documents for each list. It is possible that not every document will apply to you.

Form or Documents	These documents show:	Provided by
<input type="checkbox"/> W-2	Wages Salaries Social Security taxes withheld Medicare taxes withheld	Your employer (by January 31 st)
	Gambling winnings	Organization that paid winnings
<input type="checkbox"/> 1099-G	Unemployment benefits State tax refund	The state in which you live
<input type="checkbox"/> 1099-Interest	Interest from savings account(s) Interest from checking account(s) Interest from bonds	Your bank
<input type="checkbox"/> 1099-Dividends	Dividends from stocks	Your stockbroker or trading app
<input type="checkbox"/> 1099-B	Sales of stock Realized gains Realized losses	Your stockbroker, your stockbroker's company, or trading app
<input type="checkbox"/> 1099-R	Retirement income	Pension company
<input type="checkbox"/> SSA-1099	Social Security income Medicare payments	Social Security Administration
<input type="checkbox"/> Rent checks received <input type="checkbox"/> Bank statements <input type="checkbox"/> Utility & repair bills paid	Rental property income Rental property expenses	Self-documented
<input type="checkbox"/> Schedule C		irs.gov/pub/irs-pdf/f1040sc.pdf
<input type="checkbox"/> Sales information <input type="checkbox"/> Inventory costs <input type="checkbox"/> Costs of goods sold <input type="checkbox"/> Rent, Utility, & Furniture purchase payments	Business income Business expenses	Self-documented
<input type="checkbox"/> 1099-S	Proceeds for real estate sale	Bank or title company
<input type="checkbox"/> Purchase documentation <input type="checkbox"/> Improvement cost receipts	Real estate purchase and improvement costs	Self-documented
<input type="checkbox"/> 1099 Miscellaneous	Other income	irs.gov/pub/irs-pdf/f1099misc.pdf

