



## Client Checklist for Income

Provide copies of all tax forms for income:

- **W-2** (an IRS form showing the total wages paid to an employee and the taxes withheld during the calendar year: prepared by an employer for each employee)
- **1099-R** (tax form for reporting distributions from annuities, profit-sharing plans, retirement plans, IRAs, insurance contracts, or pensions)
- **1099-INT** (tax form used to report interest income)
- **1099-G** (form used to report unemployment compensation, as well as any state or local income tax refunds you received that year)
- **1099-MISC** (form used to report the income of taxpayers who are not employees, such as independent contractors, freelancers, sole-proprietors, and self-employed individuals)
- **1099-DIV** (form used by banks and other financial institutions to report dividends and other distributions to taxpayers and to the IRS)
- **1099-A** (form to report various nonwage payments and transactions typically used when property has been transferred due to foreclosure)
- **5498** (form reports IRA contributions, rollovers, Roth IRA conversions, and required minimum distributions (RMDs) to the IRS)
- **SSA-1099** (form that shows the total amount of benefits you received from Social Security in the previous year)
- **K-1** (form issued annually for an investment in a partnership. It reports each partner's share of the partnership's earnings, losses, deductions, and credits)
- **1099-NEC** (form that solely reports nonemployee compensation. Form 1099-NEC is only replacing the use of Form 1099-MISC for reporting independent contractor payments)

- **1099-B** (form used by brokerages and barter exchanges to record customers' gains and losses during a tax year)
- **1099-C** (form used to report a canceled or forgiven debt of \$600 or more from a commercial lender)
- **W-2G** (document that a gaming facility may send you in January if you received winnings from gambling in the prior year)
- **RRB-1099** (issued by the U.S. Railroad Retirement Board (RRB) and represents payments made to you in the tax year indicated on the statement)