

## INCOME & TAX FORM CHECKLIST

**Name:** \_\_\_\_\_

This worksheet is to make sure I'm not missing anything!

**Tax Year:** \_\_\_\_\_

**HOW MANY** of each type of form should I have? (number of forms, not \$ amounts)

<u>Document</u>	<u>Taxpayer</u>	<u>Spouse</u>	<u>NOTES:</u>
W-2 (Employee Wages)	_____	_____	_____
1099-INT (Interest income)	_____	_____	_____
1099-DIV (Investment income)	_____	_____	_____
1099-R (IRA, Pension, Annuity, etc)	_____	_____	_____
1099-NEC (Business income)	_____	_____	_____
1099-Misc (Other income)	_____	_____	_____
1099-G (Unemployment)	_____	_____	_____
SSA-1099 (Social Security)	_____	_____	_____
K-1 (Partnership, LLC, S-Corp, Trust)	_____	_____	_____

**Other forms:**

[illegible]

**Additional business income not on 1099** (enter Income amounts) Include Venmo, Zelle, & Paypal, etc

Enter total for each type, not for each payer (ex. Gigs, Teaching, Music/Merch Sales, etc. or Occupation)

[illegible]