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 from you?** *(**number of forms, not $ amounts**)*

Document	Taxpayer	Spouse	NOTES:
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:

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

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

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

Type or Occupation	$ Amount	$ Amount	NOTES:
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____