

Tax Forms List

Income

- W-2** These have your employment earnings and deductions.
- Form 1098** Interest for your mortgage.
- 1098-T** Student tuition payments.
- 1098-E** Student Loan interest.
- 1099-B** - Income from selling securities at a brokerage account. Whether you gain or lose money from stock you must report this.
- 1099-DIV** Income earned from investments dividends and distributions. It comes from brokerage accounts that hold stocks or mutual funds, and investments paid out dividends. These forms do not include dividend income from tax sheltered accounts such as IRAs.
- 1099-G** Reports unemployment compensation or other government payments.
- 1099-INT** Reports interest that has been made on savings accounts.
- 1099-K** Reports income received from third party payment processing companies such as PayPal, Venmo and Cash App. In the past you would only receive this form if you had over 200 transactions totaling 20k, but the IRS has a goal to lower the threshold to only 600 in stages. For example, this tax year it is 5000.
- 1099-MISC** Reports miscellaneous income. If you have received over 600 from a business, you should have received one of these forms. Types include prize money, rental payments for space or equipment.
- 1099-NEC** Reports non-employee compensation. If you are self-employed such as a gig worker or freelancer or independent contractor and did work over 600.
- 1099-R** Reports retirement account distributions.
- SSA-1099** Reports Social security income.

Deductions

- Childcare Expenses

Filing Forms

- 1040/1040 SR** - Federal Income tax form to report income. 1040 SR is for seniors.
- 1040 X** - Used to amend an already filed 1040 form.
- Form 4868** - Used to get an extension until October.
- Schedule A** - For itemizing your deductions.
- Schedule B** - Reporting interests and dividends over 1500 that are taxable.
- Schedule C** - Reporting the profits and losses from freelancing, side gigs, or contractor work.
- Schedule D** - Reporting capital gains or losses from investments sold throughout the year.