

# Tax Filing Tips: **Income Reporting Documents Checklist**

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**The documents on this checklist are a general guideline. Individual taxpayers may receive other documents that report taxable income based on their unique situation.**

**W-2** Used to report wages and salary; most common form. You may receive multiple W-2s if you worked multiple jobs or changed jobs throughout the year.

**1099-INT** Reports interest from bank accounts or other investments.

**1099-DIV** Reports dividends earned from investments.

**1099-B** Reports income from the sale of investments such as stocks or bonds.

The 1099-B, 1099-DIV, and 1099-INT may be combined into one report issued by a financial institution.

**1099-R** Reports distributions from retirement accounts (401K, IRAs, pension plans). May report disability income for some individuals.

**1098-T** Issued by qualified educational institutions to report scholarship/grant income and tuition paid.

**1099-G** Reports unemployment compensation received throughout the year.

**1099-MISC/1099-NEC** Used to report self-employment income. Must create schedule C to report this income. Rideshare or food delivery drivers commonly receive this form.

**1099-K** If you have a gig type job you may receive a Form 1099-K representing total dollar amount of total reportable payment transactions.

**SSA-1099** Used to report social security benefits received throughout the year.

**W-2G** Used to report any gambling winnings received in the past year.

<https://www.irs.gov/forms-instructions>