



Sources of Income

Many of these forms won't be needed to file taxes every year. For example, you will only receive the investment forms you may need to file your taxes if you had distributions or other activity.

Employed Forms W-2

Unemployed Unemployment (1099-G)

Self-Employed Forms 1099, Schedules K-1, income records to verify amounts not reported on 1099-MISC or 1099-NEC

Records of all expenses — check registers or credit card statements, and receipts

Business-use asset information (cost, date placed in service, etc.) for depreciation

Office in home information, if applicable

Record of estimated tax payments made (Form 1040-ES)

Rental Income Records of income and expenses

Rental asset information (cost, date placed in service, etc.) for depreciation

Record of estimated tax payments made (Form 1040-ES)

Retirement Income Pension/IRA/annuity income (1099-R)

Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)

Social security/RRB income: [SSA-1099](#), RRB-1099

Savings & Investments or Dividends Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)

Income from sales of stock or other property (1099-B, 1099-S)

Dates of acquisition and records of your cost or other basis in property you sold (if basis is not reported on 1099-B)

Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)

Expenses related to your investments

Record of estimated tax payments made (Form 1040-ES)

Transactions involving cryptocurrency (Virtual currency)

Other Income & Losses

Payment Card and Third Party Network Transactions - 1099-K

Gambling income (W-2G or records showing income, as well as expense records)

Jury duty records

Hobby income and expenses

Prizes and awards

Trust income

Royalty Income 1099-MISC

Any other [1099s](#) received

Record of alimony paid/received with ex-spouse's name and SSN

State tax refund