What to Provide?

**Employed**

* W2

**Unemployed**

* Unemployment (1099-G)

**Self-employed**

* Form 1099-NEC, 1099-K, Schedule K-1
* Income not reported on 1099s
* Record of all expenses (see Business Activity spreadsheet)
* Estimated tax payments made

**Rental Income**

* Record of income and expenses (See Rental Activity spreadsheet)

**Retirement Income**

* Pension/IRA/annuity income (1099-R)
* Social security (SSA-1099)

**Savings/Investments/Dividends**

* Interest, dividend income (1099-INT, 1099-DIV)
* Income/loss from sale of stock or other property (1099-B, 1099-S)
* Health Savings Account (1099-SA)

**Other Income**

* Gambling income (W-2G)
* Hobby income/expenses
* Royalty Income (1099-MISC)

**Home Ownership**

* Mortgage interest (Form 1098)
* Property tax records (sometimes on Form 1098)

**Charitable Donations**

* Cash donations paid to houses of worship, schools and other charitable organizations
* Records of non-cash charitable donations

**Marketplace Insurance**

* 1095-A

**Childcare Expenses**

* Fees paid to licensed day care or baby sitter
  + Provider Name, Address, and EIN or SSN of each care provider and amount paid for each child.

**Educational Expenses**

* Tuition paid to educational institution (1098-T)
* Student loan interest paid (1098-E)

**K-12 Educator expenses**