

Which Tax Forms Do I Need?

Income

Wages/Salary (Form W-2)

Scholarships (Forms W-2, 1098-T)

Interest/Dividends from checking/savings, bonds, CDs, brokerage (Form 1099-INT, 1099-DIV)

State/local refund (Form 1099-G)

Self-Employment (Form 1099-MISC, cash)

Stock, Bonds, or Real Estate Income/loss (Forms 1099-S, 1099-B)

Disability Income (Forms 1099-R, W-2)

Pension, Annuity, and/or IRA Payments (Form 1099-R)

Unemployment Compensation (Form 1099-G)

Social Security/Railroad Retirement Benefits (Forms SSA-1099, RRB-1099)

Expenses

College or post secondary for self, spouse, dependents (Form 1098-T)

Home mortgage interest (Form 1098)

Real estate/personal property taxes for home or vehicle (Form 1098)

Student loan Interest (Form 1098-E)

Life Events

Health Savings Account (Forms 5498-SA, 1099-SA, W-2 with code W in box 12)

Buy, sell, foreclose home (Forms 1099-C, 1099-A)

Debt from mortgage or credit card cancelled/forgiven by commercial lender (Forms 1099-C, 1099-A)

Health Care Coverage

Health care through Marketplace (Form 1095-A)

Health care not from Marketplace (Form 1095-B or Form 1095-C)

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