



Common Tax Forms Included for Individual Tax Preparation

- W2 (Wages)
- 1099-DIV (Dividends)
- 1099-INT (Interest)
- 1099-MISC (Rents/other payments)
- 1099-NEC (Non-employee compensation)
- 1099-G (Government payments - unemployment)
- 1099-R (Retirement distributions)
- 1099-SSA (Social Security income)
- 1098 (Mortgage interest)
- 1098-T (Tuition payments)
- 1099-SA (HSA distributions)
- 5498-SA (HSA contributions)
- 5498 (IRA contributions)
- 1095-A/B/C (Health insurance coverage)
- Property tax statements
- Investment account tax forms

Generally, if you opt out of paper statements with financial institutions, you will need to log in to their website to download or request year-end tax forms.