



KNAPP

BUSINESS SOLUTIONS

KBSTAX.COM

If you had the following:

<u>If you had the following:</u>	<u>Yes</u>	<u>You need:</u>	<u># of Forms</u>
Wage or Salary earnings from a job	<input type="checkbox"/>	W-2	_____
Interest Income	<input type="checkbox"/>	1099-INT	_____
Dividends	<input type="checkbox"/>	1099-DIV	_____
Stock or Brokerage accounts (Non-Retirement)	<input type="checkbox"/>	1099-B	_____
Sale of Real Estate	<input type="checkbox"/>	1099-S	_____
Unemployment, State or Government payments	<input type="checkbox"/>	1099-G	_____
Other Income	<input type="checkbox"/>	1099-MISC	_____
Gambling Winnings	<input type="checkbox"/>	W-2 G	_____
Cancellation of Debt	<input type="checkbox"/>	1099-C	_____
Distributions from Pension, Annuities or Retirement	<input type="checkbox"/>	1099-R	_____
Payments from the Railroad Retirement Board	<input type="checkbox"/>	RRB-1099	_____
Railroad Retirement for Pensions or Annuities	<input type="checkbox"/>	RRB-1099-R	_____
Social Security Retirement	<input type="checkbox"/>	SSA-1099	_____
IRA - (Fair Market Value) statement	<input type="checkbox"/>	5498	_____
Small Business - (Contact us - We need more info)	<input type="checkbox"/>	1099-MISC	_____
Rental Property - (Contact us - We need more info)	<input type="checkbox"/>	(Support Docs)	_____
Royalty Income	<input type="checkbox"/>	1099-MISC	_____
Farm Operations - (Contact us - We need more info)	<input type="checkbox"/>	(Support Docs)	_____
Partnership, S-Corporation <u>or</u> Trust	<input type="checkbox"/>	K-1	_____
Mortgage Interest	<input type="checkbox"/>	1098	_____
Student Loan Interest	<input type="checkbox"/>	1098-E	_____
College Tuition	<input type="checkbox"/>	1098-T	_____
Distributions - Education Programs (ie. 529 & 530)	<input type="checkbox"/>	1099-Q	_____
Affordable Care Act - Marketplace Health Insurance	<input type="checkbox"/>	1095-A	_____
Contribution - H.S.A <u>or</u> M.S.A Health Savings	<input type="checkbox"/>	5498-SA	_____
Distributions - H.S.A <u>or</u> M.S.A Health Savings	<input type="checkbox"/>	1099-SA	_____
Charity, Real Estate Tax, Medical / Dental / Prescription	<input type="checkbox"/>	(Support Docs)	_____

**** Additional documentation may be required - Please email or call with questions ****