



On Point Tax & Accounting

Items to Provide for Tax Preparation

Item to Provide	Form
Drop Off Form and Signed Engagement Letter	
Amount of Economic Stimulus Payment Received in 2020 and 2021	
Wage Statements	W-2 or 1099-NEC
Pension and Retirement Income	1099-R
IRA Distributions	1099-R
Social Security	SSA-1099
Railroad Retirement	RRB-1099
Unemployment Income	1099-G
State Refund Amount	1099-G
Interest and Dividend Income	1099-INT or 1099-DIV
Self-employed Business Income and Expenses	Summarized
Brokerage Year End Tax Statement	1099-B
Lottery or Gambling Winnings and Losses	W-2G
Income from Partnerships S Corporations, Trusts, and Estates	Schedule K-1
Income and Expenses from Rentals	Summarized
Mortgage or Home Equity Loan Interest Paid	1098
Student Loan Interest	1098E
Tuition Statements	1098T
Withdrawals from 529 College Plans	1099-Q
IRA Contributions	Form 5498

Other Items
Alimony Paid or Received + Date of Divorce Decree
Records of Purchase, Sale or Refinance of a House (Closing Disclosure/Settlement Package)
Medical and Dental Expenses
Real Estate and Personal Property Taxes (if not on mortgage statement)
Estimated Tax Payments - Fed/State/Amount/Date Paid
Cash and Non-Cash Charitable Donations
Childcare Expenses and Provider Information (Provider Info, ID#, Phone #, Total \$ Paid for Year)
Unreimbursed Employment Related Expenses (PA only)