**Tax Form Checklist**

Annual tax information forms that are sent for tax purposes

As a reminder, here is a simple check list of annual tax forms that are sent out. Please provide copies of all that are applicable to you when providing your tax data.

* W-2 for wages
* 1099-DIV for dividends
* 1099-NEC for income
* 1099-R for retirement
* 1099-INT for interest
* 1099-MISC for income
* W-2G for gambling
* 1099-B for brokerage
* 1099-G for refunds & unemployment
* 1098-T for tuition
* SSA-1099 for Social Security income
* 1098-for mortgage interest
* 1099-K for income
* 1099-SA for HSA's
* Form 5498 for IRA value
* IRA and Roth IRA contributions for 2021
* K-1 forms from investments in S corporations or partnerships
* 2021 property tax statement.
* For MN property tax refund, please provide a copy of your 2022 property tax statement (not proposed tax statement) that is usually sent mid/late March.

**If you have bought and/or sold a home in 2021 we need the closing statements on both purchases and sale with lists and costs of major improvements.**