

Ministry CPA Tax Document Checklist

Use this checklist as a helpful reference as you gather your tax documents.

Income

- Forms W-2 and W-2C
- Forms 1099-NEC (Non-employee compensation)
- Forms 1099-Misc. (Miscellaneous income)
- Forms 1099-INT (Interest)
- Forms 1099-DIV (Dividends)
- Forms 1099-R (Retirement Account Distributions)
- Forms 1099-B or Forms 1099-S (Sales of stock or property)
- Forms 1099-Q (Qualified education program distributions)
- Forms SSA-1099 (Social Security Income)
- Forms 1099-G (Unemployment, refunds)
- Schedules K-1 (Partnership, S-Corp income, and Trusts)
- 1099-SA (HSA distributions)
- Closing Statements for sale and purchases of property

Deductions and Credits

- Forms 1098 (Mortgage interest statements)
- Real Estate tax bill paid in current year
- 1098-T (Tuition statement)
- For teachers: out of pocket expenses for classroom
- Form 1095-A (Marketplace health coverage)
- Giving statements for charitable contributions
- Forms 1098-E (Student loan interest)
- Form 5498 (IRA Contributions Information report)
- Private School Tuition Statement
- Education Savings Fund 529
- Form 8949 (Virtual Currency Activity Statement) or annual summary statement

Ministers

- Housing allowance worksheet
- Unreimbursed ministerial expenses

Other

- Current Copy of Driver's License
- IRS Notice CP01A (Protective Identity Number)
- State PIN