

# The Shoebox Method

Keep an eye out for the following documents and add them to your collection

- W2** Employment wages & salary
- 1099-G** Unemployment income
- 1099 –MISC** Other income
- 1099-NEC** Non-Employee Income
  - New for independent contractors in 2020
- 1099 –R** Pension, IRA, annuity income
- 1099 – SSA** Social Security income
- 1099 – INT, 1099 – OID, 1099 – DIV:** Interest and dividend income
- 1099 – B, 1099 – S** Sale of stock or other property
- 1099 – SA, 1099 – LTC** Health Savings Accounts or long-term care reimbursements
- 1098-T** – Tuition paid
- 1098** – Mortgage and other interest paid
- 1095-A** Verification of marketplace health insurance
- 5498 –IRA** contributions, rollovers, etc.
- 5498 - HSA** – Contribution reporting for Health Savings Accounts and Flexible Savings Accounts
- K-1** – if you own a partnership interest, S-Corp, or are the beneficiary of a trust

Other tax information from your personal records may include details for:

- Childcare costs
- Property taxes
- Charitable donations
- Business expenses
- Medical expenses
- Property and casualty losses

- Got your docs?
- Ready to file?
- Have a question?

Use the camera on your smartphone to scan the QR code to schedule a quick chat or a planning session. The deadline to file your 2020 tax return is April 15, 2021.

