



Common Tax Forms

Form:	Overview:
W-2:	Form W-2 shows important information about the income you've earned from your employer, amount of taxes withheld from your paycheck, benefits provided and other information for the year. You use this form to file your federal and state taxes.
Social Security Benefit (SSA-1099):	Form 1099-SSA is used to report Social Security benefits. It shows the total amount of benefits received during the tax year. The form may also include any federal income tax withheld from the benefits.
1099 Consolidated Statement:	A 1099 consolidated tax statement combines multiple 1099 forms 1099-INT, 1099-DIV, 1099-OID, 1099-B, and/or 1099-MISC—into a single, multi-page document. Some consolidated statements include all 5 forms, while others only include the 1099s the IRS requires.
1099-DIV: Dividends and Distributions:	If some of the stocks you own pay dividends, or a mutual fund you invest in made a capital gains distribution to you during the year, you'll receive a 1099-DIV form.
1099-INT: Interest Income:	If you receive a 1099-INT, the tax form that reports most payments of interest income, you may or may not have to pay income tax on the interest it reports. However, you may still need to include the information from it on your return.

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1099-Q: Payments from Qualified Education Programs:	You'll receive an IRS Form 1099-Q when you withdrawal money from a 529 plan or a Coverdell Education Savings Account (Coverdell ESA).
1099-R: Distributions From Pensions, Annuities, Retirement, etc.:	Form 1099-R is used to report the distribution of retirement benefits such as pensions and annuities. You should receive a copy of Form 1099-R, or some variation, if you received a distribution of \$10 or more from your retirement plan.
Schedule K-1 (Form 1041):	Schedule K-1 (Form 1041) is used to report a beneficiary's share of an estate, including income, credits, deductions and profits.
Schedule K-1 (Form 1065) - Partnership:	The Schedule K-1 (Form 1065) is a document prepared by a partnership as part of filing its Form 1065, U.S. Return of Partnership Income. The partnership then provides each partner a Schedule K-1 1065 Form reflecting their share of income, deductions, credits, and other items that the partner will need to report on their individual tax return (Form 1040).
Schedule K-1 (Form 1120-S) - Shareholder's Share of Income:	Schedule K-1 (Form 1120S) is prepared by a corporation as part of the filing of their tax return. Each shareholder is provided a Schedule K-1 by the corporation. The K-1 reflects the shareholder's share of income, deductions, credits and other items that the shareholder will need to report on their individual tax return (Form 1040).
Form 1099- MISC:	Form 1099-MISC reports payments other than nonemployee compensation made by a trade or business to others.

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Form 1099-NEC:	Businesses use IRS Form 1099-NEC to report non-employee compensation of \$600 or more, or whenever they withhold federal income taxes. In this article, we'll look at the details of Form 1099-NEC, including its purpose, reporting obligations, and how it affects both businesses and independent contractors.
Form 1099-G:	The most common uses of the 1099-G is to report unemployment compensation, as well as any state or local income tax refunds you received that year.
Form 1099-K:	Form 1099-K is a report of payments you received for goods or services during the year from: <ul style="list-style-type: none"> - Credit, debit or stored value cards such as gift cards (payment cards). - Payment apps or online marketplaces, also called third party settlement organizations or TPSOs
W-2G:	Gambling winnings are subject to federal income tax. By the end of January, you may receive tax Form W-2G. Certain Gambling Winnings from the casino or other payer that provided your winnings.
Schedule E:	If you earn rental income on a home or building you own, receive royalties or have income reported on a Schedule K-1 from a partnership or S corporation, then you must prepare a Schedule E with your tax return. You must report all income and losses from these activities on the Schedule E as well as your personal tax return.
Schedule F:	If you earn a living as a self-employed farmer, you may need to include a Schedule F attachment with your tax return to report your profit or loss for the year. The Internal Revenue Service defines “farmer” in a very broad sense—whether you grow crops, raise livestock, breed fish or operate a ranch.