MWOMACK FINANCIAL SOLUTIONS | OPTIONS WITHOUT PRESSURE

Tax Season Document Guide

Which forms arrive when, and what to do if one is missing. Filing before your documents are complete is the most common cause of amended returns.

Late January

- W-2 from employers.
- 1099-NEC for contract work.
- 1099-INT and 1099-DIV from banks and brokerages.
- 1098-T from schools and 1098 for mortgage interest.

February

- 1099-B for investment sales.
- 1099-MISC for rents, royalties, and awards.
- Health coverage forms 1095-A, B, or C.
- Corrected versions of earlier forms.

March and Beyond

- Schedule K-1 from partnerships and S corporations.
- Consolidated brokerage statements and corrections.
- Foreign account or investment statements.

If a Document Is Missing

- Check the issuer's online portal first.
- Confirm the mailing address they have on file.
- Contact the issuer and request a reissue in writing.
- Use your own records to estimate only as a last resort, and discuss it with your preparer.
- Consider an extension rather than filing an incomplete return.

Before You File

- Compare this year's documents to last year's return.
- Confirm every dependent's information.
- Verify bank details for refund delivery.
- Keep a complete copy of everything submitted.

Questions? Schedule a consultation at mwomackfinancial.com or call 1-844-693-7829.