

Individual Tax Returns

1. **Form 1040** - U.S. Individual Income Tax Return.
 2. **Form 1040-SR** - U.S. Individual Income Tax Return for Seniors (aged 65+).
 3. **Form 1040-NR** - U.S. Nonresident Alien Income Tax Return.
 4. **Form 1040-X** - Amended U.S. Individual Income Tax Return.
 5. **Form 4868** - Application for Automatic Extension of Time to File U.S. Individual Income Tax Return.
 6. **Form 1040-ES** - Estimated Tax for Individuals.
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Income Forms

7. **Form W-2** - Wage and Tax Statement.
 8. **Form W-4** - Employee's Withholding Certificate.
 9. **Form W-7** - Application for IRS Individual Taxpayer Identification Number (ITIN).
 10. **Form W-9** - Request for Taxpayer Identification Number and Certification.
 11. **Form 1099 series:**
 - **1099-MISC** - Miscellaneous Income.
 - **1099-NEC** - Nonemployee Compensation.
 - **1099-INT** - Interest Income.
 - **1099-DIV** - Dividends and Distributions.
 - **1099-B** - Proceeds from Broker and Barter Exchanges.
 - **1099-G** - Government Payments (e.g., unemployment).
 - **1099-K** - Payment Card and Third-Party Network Transactions.
 - **1099-S** - Proceeds from Real Estate Transactions.
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Schedules for Form 1040

12. **Schedule A** - Itemized Deductions.
13. **Schedule B** - Interest and Ordinary Dividends.
14. **Schedule C** - Profit or Loss from Business (Sole Proprietors).
15. **Schedule D** - Capital Gains and Losses (e.g., sale of investments).
16. **Schedule E** - Supplemental Income and Loss (rental, royalties, partnerships, S corporations).
17. **Schedule F** - Profit or Loss from Farming.
18. **Schedule SE** - Self-Employment Tax.
19. **Schedule 1** - Additional Income and Adjustments to Income.
20. **Schedule 2** - Additional Taxes.
21. **Schedule 3** - Additional Credits and Payments.

Deductions and Credits

- 22. **Form 2441** - Child and Dependent Care Expenses.
 - 23. **Form 8863** - Education Credits (American Opportunity, Lifetime Learning).
 - 24. **Form 8880** - Credit for Qualified Retirement Savings Contributions.
 - 25. **Form 8889** - Health Savings Accounts (HSAs).
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Income Adjustments

- 26. **Form 2106** - Employee Business Expenses (limited use).
 - 27. **Form 3903** - Moving Expenses (for Armed Forces).
 - 28. **Form 8917** - Tuition and Fees Deduction.
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Self-Employment and Farming

- 29. **Schedule C** - Profit or Loss from Business (Sole Proprietors).
 - 30. **Schedule F** - Profit or Loss from Farming.
 - 31. **Form 4835** - Farm Rental Income and Expenses (landowner's share from farming).
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Capital Gains and Losses

- 32. **Form 8949** - Sales and Other Dispositions of Capital Assets (detailed reporting of capital transactions).
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Special Situations

- 33. **Form 8812** - Additional Child Tax Credit.
 - 34. **Form 8962** - Premium Tax Credit (Marketplace health insurance).
 - 35. **Form 5329** - Additional Taxes on Qualified Plans (early withdrawals, excess contributions).
 - 36. **Form 6251** - Alternative Minimum Tax (AMT).
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Essential forms, schedules, and amendments relevant for the EA Part 1 Exam.

Estate and Gift Tax

- 37. **Form 709** - U.S. Gift and Generation-Skipping Transfer Tax Return.
 - 38. **Form 706** - U.S. Estate and Generation-Skipping Transfer Tax Return.
 - 39. **Form 706-NA** - Estate Tax Return for Nonresident Aliens.
 - 40. **Form 1041** - Income Tax Return for Estates and Trusts.
 - 41. **Schedule K-1 (Form 1041)** - Beneficiary's Share of Income, Deductions, and Credits.
 - 42. **Form 56** - Notice Concerning Fiduciary Relationship.
 - 43. **Form 1310** - Statement of Person Claiming Refund Due a Deceased Taxpayer.
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Miscellaneous and Administrative

- 44. **Form 9465** - Installment Agreement Request.
 - 45. **Form 8379** - Injured Spouse Allocation.
 - 46. **Form 8857** - Request for Innocent Spouse Relief.
 - 47. **Form 8821** - Tax Information Authorization.
 - 48. **Form 2848** - Power of Attorney and Declaration of Representative.
 - 49. **Form 3520** - Report Transactions with Foreign Trusts or Large Foreign Gifts.
 - 50. **Form 3520-A** - Annual Information Return of Foreign Trusts with U.S. Owners.
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