

Tax Filing Checklist

Use this checklist to gather all documents needed for filing your taxes.

- Personal Information: Social Security numbers for you, spouse, and dependents.
- Income Documents: W-2s, 1099-NEC, 1099-MISC, 1099-K, 1099-INT, 1099-DIV, 1099-B, SSA-1099.
- Business Income & Expenses: Profit & loss statements, receipts, mileage logs.
- Deductions: Mortgage interest (1098), property taxes, charitable donations, medical expenses.
- Education: 1098-T, student loan interest (1098-E).
- Childcare: Provider's name, address, tax ID, and total paid.
- Investments: Brokerage statements, crypto transactions, capital gains info.
- Retirement: 5498, 1099-R.
- Health Insurance: 1095-A, 1095-B, or 1095-C.
- Bank account information for direct deposit or payment.
- Last year's tax return (optional but useful).