

Remember, this checklist is a general guide, and your specific situation may require additional documentation. It's always a good idea to consult with your tax preparer or advisor to ensure you have all the necessary information for your individual tax situation.

Personal Information:

1. Social Security Numbers (or Tax ID Numbers) for yourself, your spouse, and dependents.
2. Date of birth for all individuals listed on the tax return.
3. Your filing status (Single, Married Filing Jointly, Head of Household, etc.).

Income Documents:

4. W-2 forms for all jobs worked during the tax year.
5. 1099-MISC for any miscellaneous income, such as freelance work or contract jobs.
6. 1099-INT for interest earned on bank accounts.
7. 1099-DIV for dividends from investments.
8. 1099-B for capital gains and losses from the sale of investments.
9. 1099-R for distributions from retirement accounts.
10. K-1 forms for income from partnerships, S corporations, or trusts.

Deduction and Credit Documents:

11. Receipts or documentation for any business expenses or unreimbursed employee expenses.
12. Mortgage interest statements (Form 1098) for homeowners.
13. Real estate tax records.
14. Proof of any additional deductions or credits you plan to claim.

Health Insurance Information:

15. Form 1095-A, 1095-B, or 1095-C, which provides information about health insurance coverage.
16. Exemption Certificate, if applicable.

Education Expenses:

17. Form 1098-T for tuition and other education expenses.
18. Records of any student loan interest paid.

Child and Dependent Care Information:

19. Childcare provider information, including name, address, and Tax ID or Social Security Number.

Other Relevant Documents:

20. Any IRS correspondence or notices received during the year.
21. Bank account information for direct deposit or withdrawal purposes.

For Homeowners:

22. Closing statements for any real estate transactions during the year.
23. Energy-efficient home improvement receipts (for potential energy credits).

For Investors:

24. Records of any buying or selling of stocks or other investments.