

Tax Filing Preparation Checklist

Use this checklist to stay organized before filing your taxes.

Personal Information

- ☐ Social Security numbers / ITINs
- ☐ Dates of birth for all dependents
- ☐ Current address
- ☐ Bank account & routing numbers

Income Documents

- ☐ W-2s
- ☐ 1099-NEC / 1099-MISC
- ☐ 1099-INT / 1099-DIV
- ☐ 1099-K
- ☐ K-1s
- ☐ Unemployment income
- ☐ Rental income records

Business / Self-Employment

- ☐ Profit & loss statement
- ☐ Business bank statements
- ☐ Expense receipts
- ☐ Mileage log
- ☐ Home office information
- ☐ Payroll records

Deductions & Credits

- ☐ Mortgage interest (1098)
- ☐ Property tax statements

- ☐ Charitable donations
- ☐ Medical expenses
- ☐ Student loan interest
- ☐ Childcare expenses
- ☐ Education expenses (1098-T)
- ☐ Energy-efficient improvements

Investments & Assets

- ☐ Brokerage statements
- ☐ Crypto transaction records
- ☐ Asset purchase & sale details
- ☐ Real estate sale documents

Other

- ☐ Prior-year tax return
- ☐ Notes on major life changes

Tip: Keep this checklist with a dedicated tax folder (digital or physical) and update it throughout the year to make next tax season even easier.