

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.