

Individual Taxpayer Checklist for Tax Filing

Personal Information

- ☐ Social Security Numbers (SSNs) or Individual Taxpayer Identification Numbers (ITINs) for yourself, your spouse (if applicable), and all dependents.
- ☐ Date of birth for yourself, spouse, and dependents.
- ☐ Bank account information (routing and account number) for direct deposit of refunds.
- ☐ Valid government-issued ID (driver's license, state ID, or passport).

Income Documents

- ☐ W-2 forms from all the places you worked as an employee.
- ☐ 1099-K forms or tax summary from gig platforms (e.g., Uber, Lyft, DoorDash).
- ☐ 1099-MISC for other payments received for services.
- ☐ 1099-NEC for non-employee compensation from freelance or independent contractor work.
- ☐ Detailed mileage log showing date, distance, and purpose of trips for gig work.
- ☐ Receipts for business-related expenses (e.g., car repairs, gas, phone bill, etc.).
- ☐ 1099-INT for interest income from savings, CDs, or other bank accounts.
- ☐ 1099-DIV for dividends received.
- ☐ 1099-B for the sale of stocks, bonds, or mutual funds (includes cost basis information).
- ☐ Cryptocurrency transactions and reports, if applicable.
- ☐ 1099-R for pension, annuity, and retirement distributions.
- ☐ SSA-1099 for Social Security benefits.
- ☐ K-1 from Form 1065 (partnership) for income, deductions, and credits.
- ☐ K-1 from Form 1120S (S Corporation) for income, deductions, and credits.
- ☐ Records of rental income and expenses, such as mortgage interest, repairs, and property management fees.
- ☐ Unemployment compensation (Form 1099-G).
- ☐ Alimony received (if applicable).
- ☐ Gambling winnings (Form W-2G).
- ☐ Jury duty pay.

Health Insurance Information

- ☐ Form 1095-A (Health Insurance Marketplace Statement) if you had coverage through the Health Insurance Marketplace.
- ☐ Form 1095-B or 1095-C if you had employer-sponsored or other coverage (if applicable).

Adjustments to Income

- ☐ Documentation of contributions to IRAs, 401(k)s, or other retirement plans.
- ☐ Form 1098-E for student loan interest paid.
- ☐ Form 1098-T for tuition paid and qualified education expenses.
- ☐ Receipts for course-related books, fees, and supplies.
- ☐ Form 5498-SA for Health Savings Account (HSA) contributions.

Deductions and Credits

- ☐ Receipts for doctor visits, prescriptions, and medical procedures (if itemizing medical expenses).
- ☐ Health insurance premiums (if not paid pre-tax).
- ☐ Mortgage interest statement (Form 1098).
- ☐ Property tax payment records.
- ☐ Closing disclosure if you bought or sold a home.
- ☐ Receipts for cash and non-cash donations.
- ☐ Acknowledgment letters for donations over \$250.
- ☐ Receipts for daycare, after-school care, or elder care expenses.
- ☐ Daycare Provider's name, address, and tax ID or Social Security number.
- ☐ Form 1098-T for tuition and enrollment fees (for education credits).
- ☐ Receipts and manufacturer statements for energy-efficient home improvements (such as windows, doors, and solar panels).

Other Important Documents

- ☐ A copy of last year's federal and state tax returns (especially if using a new preparer).
- ☐ IRS-issued Identity Protection PIN for protection against identity theft (if applicable).