

TAX FORM CHECKLIST

Personal Information

Full legal names, Social Security Numbers (SSN), and dates of birth for you, your spouse, and dependents

Valid government-issued ID (for taxpayer and spouse)

Bank account and routing numbers for direct deposit/refund

Income Documents

W-2 forms (from all employers)

1099 forms:

1099-NEC (independent contractor income)

1099-MISC (rental, royalty, or other income)

1099-K (third-party payment services like PayPal, Venmo, or eBay)

1099-G (unemployment benefits, state tax refunds)

1099-R (retirement distributions, pensions, annuities)

1099-DIV/1099-INT (investment income, dividends, interest)

1099-B (stock sales, capital gains/losses - include cost basis info)

Social Security Benefits (SSA-1099) Alimony received (if applicable)

Rental income (include rental expenses)

Deductions & Credits

Student loan interest statement (Form 1098-E)

Mortgage interest statement (Form 1098)

Property tax statements

Charitable donations (cash & non-cash - receipts required)

Medical and dental expenses (if itemizing)

Childcare expenses (provider's name, EIN, and total paid)
Education expenses (tuition, books, supplies - Form 1098-T)
Health Savings Account (HSA) contributions (Form 5498-SA)
IRA contributions (Form 5498)
Business expenses (self-employed or freelancer deductions)

Self-Employed & Business Owners

Profit and loss statement
Business mileage log (or total miles driven for work)
Receipts for business-related expenses
Estimated tax payments made (Form 1040-ES)
Home office expenses (square footage of office vs. home)

Notes *(Limited to 68 characters per line.)*

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