Tax document checklist

TAX YEAR _____

Gather everything in one place before you file. Tick each item as it arrives.

YOU & YOUR HOUSEHOLD

- [ ] Photo ID
- [ ] SSN or ITIN for everyone on the return
- [ ] Dependents' names & birth dates
- [ ] Last year's tax return
- [ ] Bank details for direct deposit
- [ ] IRS Identity Protection PIN (if you have one)
- [ ]
- [ ]
- [ ]
- [ ]

INCOME

- [ ] W-2 from every employer
- [ ] 1099-NEC & 1099-K (freelance, gig, online sales)
- [ ] 1099-INT & 1099-DIV (interest, dividends)
- [ ] 1099-B (stock or crypto sales)
- [ ] 1099-R & SSA-1099 (pensions, Social Security)
- [ ] 1099-G (unemployment, state refund)
- [ ] Rental or other income records
- [ ]
- [ ]
- [ ]
- [ ]

DEDUCTIONS & CREDITS

- [ ] 1098 (mortgage interest)
- [ ] Property tax statements
- [ ] 1098-T (tuition)
- [ ] 1098-E (student loan interest)
- [ ] Childcare costs + provider's tax ID
- [ ] Charitable donation receipts
- [ ] Medical & dental expense receipts
- [ ] 1095-A (Marketplace health insurance)
- [ ] IRA & HSA contribution records
- [ ]
- [ ]
- [ ]
- [ ]

SELF-EMPLOYED & SIDE INCOME

- [ ] Income records & invoices
- [ ] Business expense receipts
- [ ] Mileage log
- [ ] Home office size & costs
- [ ] Estimated tax payments (dates & amounts)
- [ ]
- [ ]
- [ ]
- [ ]

KEY DATES

Federal deadline for 2026 returns

Thursday, April 15, 2027

MY STATE DEADLINE _____

APPOINTMENT _____

FILED ON _____

QUESTIONS FOR MY TAX PREPARER

A general checklist, not tax advice. Not every item applies to everyone: check IRS.gov or ask a tax professional.

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