# ■ What to Gather Before You File – Tax Filing Checklist

## Personal Information

- ■ Social Security numbers (self, spouse, dependents)
- ■ Prior year’s tax return
- ■ Driver’s license or state ID

## Income Documents

- ■ W-2 forms (employment income)
- ■ 1099 forms (freelance, interest, dividends, contract work)
- ■ Schedule K-1 (partnerships, S-corps, trusts)
- ■ Unemployment compensation statements
- ■ Social Security benefits statement (SSA-1099)

## Deductions & Credits

- ■ Mortgage interest statement (Form 1098)
- ■ Property tax records
- ■ Student loan interest (Form 1098-E)
- ■ Education expenses (Form 1098-T, receipts)
- ■ Childcare expenses (with provider’s tax ID)
- ■ Charitable donation receipts
- ■ Medical expenses (if itemizing)

## Investments & Retirement

- ■ Brokerage statements (1099-B, 1099-DIV, 1099-INT)
- ■ Retirement account distributions/contributions (1099-R, Form 5498)
- ■ Health Savings Account (HSA) documents

## Business / Self-Employment

- ■ 1099-NEC or 1099-K
- ■ Income & expense records (invoices, receipts, mileage logs)
- ■ Business asset purchase records

## Other Items

- ■ Bank account information (for refund direct deposit)
- ■ Records of estimated tax payments made

- ■ Any IRS or state tax notices received