

Tax Prep Checklist



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Tax Season

Tax season can often feel overwhelming, with its myriad of forms, deadlines, and complex regulations. To help you stay on track, we have compiled a comprehensive tax prep checklist.

Whether you're an individual taxpayer, a small business owner, or an investor, this checklist will serve as your trusty guide to ensure you have everything you need to tackle your taxes with confidence.

01 Personal Info

- Full legal name
- Date of birth
- Social Security number (SSN) or taxpayer identification number (TIN)
- Mailing address

02 Income Documents


- W-2 forms for wages earned from employers
- 1099 forms for various types of income (e.g., self-employment, freelance work)
- K-1 forms for income from partnerships or S corporations
- Rental income statements
- Unemployment compensation statements
- Social Security benefits statements (Form SSA-1099)

03 Investment Income


- 1099-B forms for proceeds from the sale of stocks, bonds, or mutual funds
- 1099-DIV forms for dividends received
- 1099-INT forms for interest earned from bank accounts or investments
- Records of any capital gains or losses

04 Deductions & Credits

- Form 1098 for mortgage interest paid
- Property tax statements
- Medical expense receipts
- Charitable contribution receipts
- Education-related expenses (e.g., 1098-T form for tuition)
- Childcare expenses (provider name, address, & Tax ID)
- Student loan interest paid



It's always a good idea to consult with a tax professional or use tax preparation software to ensure accuracy and maximize your deductions.



Remember, this checklist provides a general overview, and your specific tax situation may require additional documentation.

05 Self Employment & Business

- Business income and expense records
- Receipts for business-related expenses (e.g., supplies, travel)
- Vehicle mileage logs (if applicable)
- Home office expenses (if applicable)
- Estimated tax payments made during the year

06 Retirement Contributions

- Form 5498 for contributions to an Individual Retirement Account (IRA)
- Contributions to employer-sponsored retirement plans (e.g., 401(k), 403(b))

07 Health Insurance

- Form 1095-A, 1095-B, or 1095-C for health insurance coverage information
- Records of any Health Savings Account (HSA) contributions or withdrawals

08 Other

- Records of estimated tax payments
- Prior-year tax return (helpful for reference)
- Bank account information (for direct deposit or withdrawal)

Take the First Step

It's important to note that this checklist serves as a general guide, and consulting with an attorney is recommended to ensure your will meets all legal requirements and reflects your specific needs and wishes.

Get in Touch

Lets talk about your goals and dreams



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