



Tax Document Checklist

Gather everything before you file — organized by category

Income Documents

- W-2 (for all employers)
- 1099-MISC (for freelance / contract income)
- 1099-NEC (for non-employee compensation)
- 1099-DIV (for dividends)
- 1099-INT (for interest)
- 1099-EDR (for dividend reinvestment)
- 1099-B (for stock/bond sales)
- 1099-R (for retirement distributions)
- 1099-G (unemployment, state refunds)
- 1099-SSA (Social Security benefits)
- K-1 (partnership / S-corp / trust income)
- Rental income records

Deduction Documents

- Mortgage interest statement (Form 1098)
- Property tax receipts
- State/local taxes paid (SALT)
- Charitable donation receipts
- Medical expense receipts (over 7.5% AGI)
- Student loan interest (Form 1098-E)
- Tuition payments (Form 1098-T)
- Business expense records (self-employed)
- Home office measurements / expenses
- Vehicle mileage log (business use)

Other Important Items

- Social Security numbers (all family members)
- Bank routing / account numbers (for direct deposit)
- Identity Protection PIN (if issued by IRS)
- Health insurance Form 1095-A/B/C
- Estimated tax payments made (Form 1040-ES)
- Foreign bank account info (FBAR if > \$10K)