

# Free Tax Prep Checklist

Everything you need to file with confidence

## Personal Information

- Social Security or ITIN numbers for you, spouse, and dependents
- Government-issued photo ID
- Bank account & routing numbers (for direct deposit)
- Last year's tax return (federal and state)
- Current address and any address changes during the year

## Income Documents

- W-2 forms from all employers
- 1099-NEC / 1099-MISC for self-employment or contract work
- 1099-INT, 1099-DIV, 1099-B for interest, dividends, investments
- 1099-G for unemployment or state refunds
- 1099-R for retirement distributions, pensions, IRAs
- SSA-1099 for Social Security benefits
- K-1 forms from partnerships, S-corps, or trusts
- Records of cash, tips, side income, and digital asset sales

## Deductions & Credits

- Mortgage interest (Form 1098) and property tax statements
- Student loan interest paid (Form 1098-E)
- Tuition and education expenses (Form 1098-T)
- Childcare provider name, address, EIN, and amount paid
- Charitable contributions — cash and non-cash with receipts
- Medical & dental expenses (if itemizing)
- HSA / FSA contributions and distributions (Form 1099-SA, 5498-SA)
- Energy-efficient home improvements (solar, EV, etc.)

## Self-Employed / Side Hustle

- Total gross income and 1099-K from payment platforms
- Business expense receipts (categorized)

- Mileage log — business, medical, charitable
- Home-office square footage and total home size
- Estimated quarterly tax payments made

## **Before You File**

- Double-check names and SSNs against Social Security cards
- Confirm filing status (single, MFJ, MFS, HoH, QSS)
- Review last year's return for carryovers (losses, credits)
- Decide between standard deduction vs. itemizing
- Set up IRS online account to track refund and notices

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