



Personal Tax Checklist

Tax filing can be simple, as long as you have the right documents and know what to deduct. If you need help to gather the right stuff, use our checklist to get started. Always keep original documents and make copies of the most important ones.

Remember to keep track of your deductions! A list of the most common deductions below.

Personal Information, Income and deductions

	Document
<input type="checkbox"/> For You, Your Spouse and Your Dependents	Full legal name, date of birth, Social Security number, driver's license and last year's tax return
<input type="checkbox"/> Personal Income Statements	W-2 (for you and your spouse) and all 1099 forms (if self-employed)
<input type="checkbox"/> Unemployment Income or State or Local Tax Refunds	Form 1099-G
<input type="checkbox"/> Investment and Interest Income	1099-INT, 1099-DIV, 1099-B, Schedule K-1, K-2
<input type="checkbox"/> Home or Property Sale	Form 1099-S
<input type="checkbox"/> Social Security	Form SSA-1099
<input type="checkbox"/> Pension/IRA/Annuity	Form 1099-R (report the distribution of retirement benefits such as pensions and annuities)
<input type="checkbox"/> HSA and Long-Term Care Requirements	1099-LTC (report the payments made under a long-term care insurance contract)
<input type="checkbox"/> Trust and Estate Beneficiary Earnings	Form 1041 (report: The income, deductions, gains, losses, etc. of the estate or trust), Schedule K-1
<input type="checkbox"/> Education Expenses	Tuition statements, itemized receipts of qualified educational expenses (Form 1098-T), and student loan interest statements (Form 1098-E)
<input type="checkbox"/> Homeowner Expenses	Mortgage interest statements (Form 1098), property tax payment receipts, and energy efficient upgrade receipts (Form 5695 if provided by installer)
<input type="checkbox"/> Charitable Contributions	Detailed list of donations, receipts for contributions and Form 1098-C for vehicle donations

	Document
<input type="checkbox"/> Child and Dependent Care Expenses	Name, address, and tax ID or Social Security number of the provider
<input type="checkbox"/> Health Care Expenses	Any 1095 form (reports any health care coverage) and records of medical and dental costs
<input type="checkbox"/> IRA Contributions	Form 5498 (reports contributions, including any catch-up contributions, required minimum distributions (RMDs), and the fair market value (FMV) of the account)
<input type="checkbox"/> Health Savings Account Contributions	Form 5498-SA (reports your annual contributions to these tax-free accounts that you use to pay for medical expenses)
<input type="checkbox"/> Self-Employment Expenses	Records of business or “side hustle” income, expenses and assets (refer to the self-employed tax check list)