

Tax Preparation Checklist

A free tax season preparation checklist that you can copy, save or download as a free PDF. Last updated in 2019. Perfect for personal taxes, accountants, and clients.



Have these documents in hand before you e-file:

- ☐ Social Security number for everyone listed on your tax return
- ☐ W-2 forms from employers
- ☐ 1099 forms for contract work completed
- ☐ Income from investments (i.e., from interest, dividends, stocks/bonds, and foreign investments)
- ☐ Prior year income from local/state tax refunds
- ☐ Business income records, if you own a business
- ☐ Income from unemployment
- ☐ Income from rental properties
- ☐ Social Security benefits
- ☐ Other income (e.g., gambling, award money from the lottery, jury duty, medical savings account income)
- ☐ Brokerage account statements
- ☐ Health insurance coverage documents
- ☐ Receipts (from charity, medical expenses, and any unreimbursed business expenses)

Credits you may be eligible for

- ☐ Earned income credit

- ☐ Child and dependent care credit
- ☐ Homebuyer credit
- ☐ Energy credit
- ☐ Savers credit
- ☐ Adoption credit
- ☐ Child credit
- ☐ Credit for the elderly/disabled
- ☐ American opportunity credit
- ☐ Lifetime learning credit
- ☐ Lifetime learning credit

Possible Deductions

- ☐ IRA contributions
- ☐ Mortgage interest
- ☐ Student loan interest
- ☐ Medical savings account (MSA) contributions
- ☐ Self-employed health insurance
- ☐ Moving/relocation expenses
- ☐ Medical expenses
- ☐ Qualified business expenses
- ☐ Theft loss
- ☐ Charitable giving

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