Tax Document Checklist

Everything to gather before you file - in one printable list

Collect what applies to you. Having these ready means a faster, more accurate return and fewer back-and-forth requests.

Personal & identity

- Photo ID for you (and spouse)
- Social Security numbers or ITINs for everyone on the return
- Last year's tax return (if available)
- Bank routing and account number for direct deposit
- IRS or state letters received this year

Income

- W-2 from each employer
- 1099-NEC / 1099-K / 1099-MISC (self-employment, gig, platforms)
- 1099-INT, 1099-DIV (interest, dividends)
- 1099-B (stock or crypto sales)
- 1099-G (unemployment, state refund)
- 1099-R / SSA-1099 (retirement, Social Security)
- K-1 (partnership, S-corp, trust)
- Rental income records

Deductions & credits

- Mortgage interest (1098)
- Property tax and state/local tax records
- Student loan interest (1098-E), tuition (1098-T)
- Childcare provider name, address, EIN, and amount paid
- Charitable donation receipts
- Medical expense totals
- Self-employed: income and expense summary (see our deduction checklist)
- Energy-efficient home improvement records

- Estimated tax payments you already made (federal and state)

Tip: Snap a photo of each document as it arrives and drop it in one folder. Upload them securely and you are done.

Ready to stop guessing? A real, IRS-registered preparer handles and reviews your return. Start in about 2 minutes at **zerofusstaxes.com** or call **689-331-5723**.