

Individual Tax Preparation Checklist

A practical starting list. Not every item applies to every taxpayer or business.

Before you begin

- Prior-year federal and state tax returns
- Government-issued photo identification and taxpayer information
- Social Security numbers or ITINs for all persons on the return
- Bank details if requesting direct deposit (share securely)

Income documents

- W-2 wage statements
- 1099-INT / 1099-DIV / 1099-B investment statements
- 1099-NEC / 1099-K and self-employment records, if applicable
- 1099-R retirement distributions, SSA-1099, unemployment statements
- Rental income and expenses, if applicable

Deductions, credits & changes

- Mortgage interest, property tax and charitable contribution records if applicable
- Education tuition forms and student loan interest records
- Childcare expenses and provider information
- Health insurance marketplace Form 1095-A if applicable
- Estimated tax payments and prior-year overpayments applied
- Changes in marital status, dependents, address, work, or state residency

Final review

- Check that all expected tax forms have arrived
- List any IRS or state tax notices received
- Upload sensitive documents through the secure client portal, not email

This checklist is general information, not an exhaustive document request or individualized tax advice. Please use a secure portal to transmit sensitive records.