

What Documents Do I Need to File My Taxes?

Your Tax Checklist for the 2024/2025 Season

Tax season has a way of sneaking up. Use this checklist to stay prepared.

First Things First: Gather Your Personal Info

- ☐ Social Security Number (SSN) or ITIN
- ☐ Bank account info for direct deposit (routing and account numbers)
- ☐ Last year's AGI (Adjusted Gross Income)
- ☐ Self-Select PIN (5-digit number you used to e-sign last year)
- ☐ IP PIN (if IRS assigned one)

Income Forms to Keep an Eye Out For

- ☐ W-2 (traditional employment)
- ☐ 1099 forms (depending on work type)
- ☐ SSA-1099 (Social Security benefits)
- ☐ 1095-A (Marketplace health insurance)

Got Deductions or Credits? Grab These Docs

- ☐ Childcare or dependent care costs
- ☐ Mortgage/property tax statements
- ☐ Charitable donation receipts
- ☐ HSA/FSA contribution records
- ☐ Healthcare expenses
- ☐ Retirement account contributions
- ☐ Education expenses (books, tuition, supplies)

Side Hustle or Self-Employed? Here's What You'll

- ☐ 1099-K, 1099-NEC, or 1099-MISC forms
- ☐ Bank/payment processor reports (PayPal, Venmo, etc.)
- ☐ Checks or payment records
- ☐ Receipts for expenses (travel, office, gifts, etc.)
- ☐ Mileage logs
- ☐ Records of estimated tax payments
- ☐ Any other business-related income/expense docs