

Tax Document Checklist

Master checklist for common tax-preparation documents.

Income Documents

- ☐ W-2s
- ☐ 1099-NEC/MISC/K
- ☐ 1099-INT/DIV
- ☐ 1099-B
- ☐ 1099-R
- ☐ SSA-1099
- ☐ 1099-G
- ☐ K-1s
- ☐ Business books
- ☐ Rental reports

Deductions & Credits

- ☐ Mortgage interest
- ☐ Property tax
- ☐ Charitable receipts
- ☐ Child/dependent care
- ☐ Education forms
- ☐ Retirement contributions
- ☐ HSA records
- ☐ Eligible energy documentation
- ☐ Business-use-of-home
- ☐ Vehicle records

Other

- ☐ Prior-year return
- ☐ IRS/state notices
- ☐ Estimated tax confirmations
- ☐ Extension confirmation
- ☐ Identity protection PIN if issued

☐ Foreign account/asset information if applicable

☐ Digital asset transaction history if applicable

Important Notice

Educational use only. This material is not individualized tax, legal, accounting, or financial advice and does not create an engagement. Tax rules, forms, deadlines, and state/local requirements can change. Verify current requirements before filing or making decisions.

Primary References

[IRS Forms & Publications](#)