

Tax Prep Checklist (Individual)

Created with care by
Paige Financial Services



Personal Info.

- ☐ A Social Security or tax ID number for everyone included on your tax return
- ☐ Date of birth for everyone on your return



Self-Employment & Business Records

- ☐ Business expense records
- ☐ Quarterly estimated tax payment receipts
- ☐ Mileage records
- ☐ Home Office Expenses



Income & Investments

- ☐ Form W-2, Wage + Tax statement
- ☐ Bank or financial institution statements
- ☐ Last year's state refund amount
- ☐ Other misc. income records
- ☐ Any Form 1099's
- ☐ Information about stocks that you traded or sold (Forms 8945 and 8949)



Medical Expense Records

- ☐ Receipts for unreimbursed medical expenses
- ☐ Health insurance coverage forms (Form 1095's)
- ☐ Social Security Benefits



Education

- ☐ Tuition and qualified expenses paid (Form 1098-T)
- ☐ Student loan interest paid (Form 1098-E)



Homeownership Info.

- ☐ Property Tax Receipts



Do you feel confused or need an extra set of eyes? We're here to help! Contact us at 877-229-3829 for support.