

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



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)



Homeownership Info.

- Property Tax Receipts

Self-Employment & Business Records

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



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)



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