Tax Preparation Checklist

A free tax season preparation checklist that you can copy, save or download as a free PDF. Last updated in 2019. Perfect for personal taxes, accountants, and clients.



Have these documents in hand before you e-file:

- [ ] Social Security number for everyone listed on your tax return
- [ ] W-2 forms from employers
- [ ] 1099 forms for contract work completed
- [ ] Income from investments (i.e., from interest, dividends, stocks/bonds, and foreign investments)
- [ ] Prior year income from local/state tax refunds
- [ ] Business income records, if you own a business
- [ ] Income from unemployment
- [ ] Income from rental properties
- [ ] Social Security benefits
- [ ] Other income (e.g., gambling, award money from the lottery, jury duty, medical savings account income
- [ ] Brokerage account statements
- [ ] Health insurance coverage documents
- [ ] Receipts (from charity, medical expenses, and any unreimbursed business expenses)

Credits you may be eligible for

- [ ] Earned income credit

- [ ] Child and dependent care credit
- [ ] Homebuyer credit
- [ ] Energy credit
- [ ] Savers credit
- [ ] Adoption credit
- [ ] Child credit
- [ ] Credit for the elderly/disabled
- [ ] American opportunity credit
- [ ] Lifetime learning credit
- [ ] Lifetime learning credit

Possible Deductions

- [ ] IRA contributions
- [ ] Mortgage interest
- [ ] Student loan interest
- [ ] Medical savings account (MSA) contributions
- [ ] Self-employed health insurance
- [ ] Moving/relocation expenses
- [ ] Medical expenses
- [ ] Qualified business expenses
- [ ] Theft loss
- [ ] Charitable giving

Make and Share Free Checklists
checkli.com