# 🧾 IRS Filing Checklist for Individual Taxpayers (Simple Guide)

This checklist helps individuals filing their **personal (Form 1040)** federal income tax returns. It’s written for first-time filers and those who just need a clear, easy list of what to gather before seeing a tax preparer or filing online.

## 1. Personal Information

These are the basic details that identify you and your household.

💡 *Tip: Bring copies (or clear photos) of all IDs for everyone listed on the return.*

## 2. Income Documents

Gather **every document that shows money you earned or received** during the year. You may get these by mail or email by the end of January.

💡 *Tip: If you worked several jobs or side gigs, check that you have all your W-2s and 1099s before filing.*

## 3. Adjustments to Income

These can **reduce the amount of income you’re taxed on**, even if you don’t itemize deductions.

💡 *Tip: Keep receipts or statements that show what you paid or contributed during the year.*

## 4. Deductions & Credits

These can help you **pay less tax or increase your refund.**

### Common Deductions (if itemizing):

### Common Credits:

💡 *Tip: Credits often reduce taxes dollar-for-dollar, so keep all receipts for child care, school, or home energy projects.*

## 5. Health Care Information

The IRS requires proof that you had health coverage.

💡 *Tip: If you got health insurance through your job, they’ll usually send a 1095-C automatically.*

## 6. State & Local Taxes

Your state may require additional forms.

💡 *Tip: Even if you moved midyear, bring info for both states if you worked or lived in multiple states.*

## 7. Other Supporting Items

Extra documents that help confirm identity or past payments.

💡 *Tip: Keep any IRS letters you receive. They often explain payments or credits that affect your return.*

## ✅ Optional but Helpful

These help your preparer get you every credit you deserve.

💡 *Tip: Even small changes like a new baby or moving to a new state can affect your taxes.*

### 💡 Tips for a Smooth Filing

* Double-check names, Social Security numbers, and bank account details.
* Store your tax return and all supporting forms for **at least 3 years** (7 if self-employed or with major deductions).
* If you’re unsure about a document, **bring it anyway** — your preparer can decide if it’s needed.
* Consider using IRS Free File or a trusted preparer if you have multiple jobs or side income.

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**Purpose:** Easy reference for individuals filing their own taxes – not a substitute for professional advice.