

# Tax Prep Checklist Builder

Build your personalized tax preparation checklist

0% Complete - Start by selecting your filing status

## Step 1: Select Your Filing Status

**Single**

Unmarried or legally separated

**Married Filing Jointly**

Married, filing one return together

**Married Filing Separately**

Married, filing separate returns

**Head of Household**

Unmarried with qualifying dependent

## Key Tax Deadlines for {{STATE\_NAME}}

**W-2s and 1099s Due**

January 31

Upcoming

**IRA Contribution Deadline**

April 15

Upcoming

**Tax Filing Deadline**

April 15

Important

## Extension Deadline

October 15

If needed

## Step 2: Document Checklist

### Income Documents

- ☐ **W-2 (Wages from employers)**  
One from each employer
- ☐ **1099-NEC (Freelance/Contract income)**  
Self-employment income over \$600
- ☐ **1099-INT (Interest income)**  
From banks and investments
- ☐ **1099-DIV (Dividend income)**  
From stocks and mutual funds

### Personal Information

- ☐ **Social Security numbers**  
For you, spouse, and dependents
- ☐ **Government-issued ID**  
Driver's license or state ID
- ☐ **Bank account information**  
Routing and account numbers for direct deposit

### Deduction Documents

- ☐ **1098 (Mortgage interest)**  
From your mortgage lender
- ☐ **1098-E (Student loan interest)**  
From your loan servicer
- ☐ **1098-T (Tuition statement)**

From educational institution

- ☐ Charitable donation receipts  
Cash and non-cash contributions

### Step 3: Special Situations (Check all that apply)

☐ I'm a student or paid for education

☐ I have self-employment income

☐ I own a home

☐ I sold stocks or investments

☐ I contributed to retirement accounts

☐ I have a Health Savings Account (HSA)

☐ I have dependent children

### Your Personalized Document Checklist

### Preparation Tips for Your Situation

### Next Steps

Deadlines may vary. Check [IRS.gov](https://www.irs.gov) for current year deadlines.