

# 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 for current year deadlines.