

Tax Prep Checklist – 2025

Personal Info to Have Ready

- Social Security Number (SSN) or ITIN
- Spouse's and dependents' info (if filing jointly)
- Prior year AGI or PIN (for e-filing authentication)

Income Documents

- W-2s from employers
- 1099-NEC, 1099-MISC (freelance/gig work)
- 1099-INT, 1099-DIV (interest/dividends)
- SSA-1099 (Social Security income)
- Unemployment compensation
- Other income (rental, alimony, gambling, etc.)

Deduction/Expense Info

- Mortgage interest statement (Form 1098)
- Student loan interest (Form 1098-E)
- Property taxes paid
- Charitable donation receipts
- Childcare expenses with provider info
- Medical/dental expenses
- Retirement account contributions

Credits to Review

- Earned Income Tax Credit (EITC)
- Child Tax Credit / Credit for Other Dependents
- American Opportunity Credit (college expenses)
- Lifetime Learning Credit
- Saver's Credit (IRA/401k contributions)

Filing Checklist

- Choose your filing status
- Decide how to file (IRS Free File, software, tax pro)
- Enter direct deposit info for faster refund
- Double-check SSNs and figures
- File federal and state returns

After You File

- Save a copy of your return and confirmation
- Use IRS 'Where's My Refund' to track status
- Watch your bank account for refund
- Plan now for next year's taxes