Individual Tax Preperation Checklist

The information provided in this checklist is for general informational purposes only and does not constitute tax, legal, or accounting advice. Consult directly with TrueCount Financials for guidance specific to your situation.

1. PERSONAL INFORMATION

	Government-issued photo ID
	Social Security cards (you, spouse, dependents)
	Dates of birth for all dependents
	Prior-year tax return (if available)
	Bank account & routing number for refund or payment

2. INCOME DOCUMENTS

	Form W-2 (Employment income)
	Form 1099-INT / 1099-DIV (Interest or Dividends)
	Form 1099-R (Retirement income)
	SSA-1099 (Social Security benefits)
	Form 1099-G (Unemployment income)
	Other income documentation

3. DEDUCTIONS & CREDITS

	Mortgage interest (Form 1098)
	Property tax statements
	Charitable contributions
	Medical expenses (if applicable)
	Education expenses (Form 1098-T)
	Student loan interest
	Childcare expenses & provider information

4. ADDITIONAL INFORMATION

	Estimated tax payments
	IRS or state notices received
	Health insurance coverage (if applicable)