



Tax Document Checklist

Sources of Income

Some common ones include:

W-2s from your employer(s)

1099-G forms for unemployment income and state or local tax refunds

1099-INT, 1099-DIV, and 1099-B, 1099-DA for interest, dividends, stock sales & crypto

1099-R and SSA-1099 for retirement plan distributions and Social Security benefits

1099-S for income from the sale of your residence or other property

1099-MISC for income from a rental property

1099-Q for distributions from a 529 plan or Coverdell ESA

1099-SA for distributions from a health saving account (HSA)

Schedule K-1 for income from a pass-through business, trust, or estate

Alimony received (if your divorce or separation agreement is dated on or before December 31, 2018)

Information on other sources of income, such as gambling winnings, jury duty pay, cancellation of debt, etc.

1099-K from Ebay, PayPal, Venmo, or other online selling/payment sites

Self-Employment and Business Records

1099-NEC or 1099-K showing income earned as an independent contractor

Records of all business income and expenses

Documentation for home office expenses, including square footage of home and square footage of area used exclusively for business

Records for business assets to be depreciated, including cost and date placed in service

Miles traveled for business purposes

Deductions

Deductions can reduce your taxable income, lowering the amount of tax you owe or increasing your refund. Generally, you can claim the standard deduction, which is a flat amount based on your filing status or itemize deductions. If you itemize deductions, you need information on:

2025 Year end paystub for tips or overtime deduction

Out-of-pocket medical expenses

Premiums paid for long-term care insurance

Form 1098 showing any mortgage interest, mortgage insurance premiums, and points you paid during the tax year

1098-VLI for Auto Interest-Only for new (not used) vehicles purchased 2025

Real estate taxes

State and local income taxes or sales taxes

Taxes paid with your vehicle registration

Charitable donations

If you have any of the following deductions, known as adjustments to income, you can claim them even if you don't itemize:

Form 1098-E for student loan interest

Records of contributions to an HSA, IRA, SEP or self-employed retirement plan

Alimony paid (for divorce or separation agreements dated on or before December 31, 2018)

For teachers, expenses paid for classroom supplies

Premiums paid for self-employed health insurance

Tax Credits

Tax credits are a dollar-for-dollar reduction in the amount of tax you owe. Generally, you'll need the following documentation to claim potentially valuable tax credits:

Form 1098-T showing expenses for higher education

Childcare costs and care provider's name, address, and tax identification number

Form 1095-A if you purchase health insurance through the Health Insurance Marketplace

Estimated Tax Payments with date

Prior-year refunds applied to the current year

Any amounts paid AND the date paid for an extension