

Simple Tax Checklist

What to Gather Before Filing (2025)

- W-2 forms from all employers
- 1099 forms (NEC, MISC, K, etc.) for freelance, gig, or contract work
- Income from investments (1099-INT, 1099-DIV, 1099-B)
- Retirement income forms (SSA-1099, 1099-R)
- Prior year tax return (for carryovers and accuracy)
- Dependent information (SSNs, dates of birth)
- Business income and expense records (Schedule C)
- Bank account routing and account numbers (for refund)
- Mortgage interest statement (Form 1098)
- Property tax statements
- Records of charitable contributions
- Medical expenses and insurance premiums
- Tuition and education expenses (Form 1098-T)
- Student loan interest (Form 1098-E)
- Childcare provider info (for Dependent Care Credit)
- Health insurance coverage documents (1095-A/B/C)
- HSA contributions/distributions (Form 5498-SA, 1099-SA)
- Energy-efficient home improvement receipts (for credits)
- Vehicle purchase information (for EV credit, if applicable)