

## Tax Preparation Checklist for Individuals

### 1. Personal Information:

- Social Security Number (SSN)
- Full name, address, and contact information
- Date of birth for yourself, spouse, and dependents (if applicable)

### 2. Income Documents:

- W-2 forms for wages/salary
- 1099 forms for freelance income, interest, dividends, etc.
- Income statements from investments (e.g., brokerage statements)
- Records of rental income and expenses
- Documentation of any other sources of income (e.g., alimony, unemployment benefits)

### 3. Deductions and Credits:

- Receipts for deductible expenses (e.g., mortgage interest, property taxes, medical expenses)
- Documentation for charitable contributions (cash and non-cash)
- Records of education expenses (e.g., tuition, student loan interest)
- Information on any eligible tax credits (e.g., child tax credit, earned income credit)

### 4. Additional Information:

- Records of estimated tax payments
- Documentation related to any significant life events (e.g., marriage, divorce, birth of a child)
- Health insurance information (e.g., Form 1095-A, 1095-B, or 1095-C)
- Records of any retirement plan contributions (e.g., IRA, 401(k))