

## Tax Filing Checklist

Preparing for tax season can feel overwhelming, but staying organized makes all the difference. This checklist is designed to help you gather the most required documents and information for a smooth filing process. It's divided into two sections:

**Page 2: For Individuals**

**Page 3: For Business Owners**



Keep in mind that additional documents may be requested by your tax professional based on your unique situation. Visit [The Winston CPA Group's tax page](https://www.winstoncpagroup.com/taxes) for guidance on filing your taxes, what you can and can't write off, and how to maximize your tax savings.

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## For Individuals

- Social Security numbers (SSNs) or Taxpayer Identification Numbers (TINs) for you, your spouse, and dependents
- Driver's license or state ID
- W-2s from all employers
- 1099 forms for:
  - Self-employment income (1099-NEC, 1099-K)
  - Interest (1099-INT)
  - Dividends (1099-DIV)
  - Unemployment benefits (1099-G)
  - Social Security benefits (SSA-1099)
- Other income (e.g., rental property, investments, alimony received)
- Childcare expenses (including provider's name, address, and Tax ID)
- Educational expenses (Form 1098-T and student loan interest)
- Medical expenses and health insurance coverage (Form 1095-A, B, or C)
- Property tax and mortgage interest (Form 1098)
- Charitable donations (receipts or acknowledgment letters)
- Retirement contributions (IRA, 401(k))

## For Business Owners

- Employer Identification Number (EIN), if applicable
- Business income (1099-NEC, 1099-K, or other income records)
- Expense records:
  - Receipts for business purchases
  - Rent or lease payments
  - Utilities, phone, and internet bills
  - Advertising and marketing expenses
- Payroll records, including W-2s and 1099s issued to employees or contractors
- Mileage log for business travel
- Bank and credit card statements for business accounts
- Inventory records, if applicable
- Depreciation records for business assets (equipment, vehicles, etc.)
- Loan and interest payment records