



Federal Tax Document Checklist

Required Documents

W2s. Mailed by employer(s) by Jan 31.

Employer: ()..... ☐

Employer: ()..... ☐

Employer: ()..... ☐

Employer: ()..... ☐

1099s. Mailed by anyone who paid you at least \$600 for services.

Payer: ()..... ☐

Payer: ()..... ☐

Payer: ()..... ☐

Payer: ()..... ☐

Payer: ()..... ☐

1098s. Mailed by lenders to whom you paid deductible interest (e.g., student loans and mortgages).

Lender: ()..... ☐

Lender: ()..... ☐

Lender: ()..... ☐

Lender: ()..... ☐

1099-INT. Mailed by investments that paid you more than \$10 of interest.

Account: ()..... ☐

Account: ()..... ☐

Account: ()..... ☐

Account: ()..... ☐

1099-E. If you received unemployment, mailed by your state.

State: ()..... ☐

Required Forms (If you are filing yourself without software.)

[1040](#) (or [1040A](#) or [1040EZ](#)) ☐

[Schedule A](#) (If you plan to itemize deductions.) ☐

[Schedule C](#) (If you have self-employment profit or loss.) ☐

[Schedule SE](#) (If you had a self-employment profit.) ☐

Other Helpful Documents

Receipts for deductible expenses ☐

Business bank and credit card account statements..... ☐

List of retirement account contributions ☐

Copy of last year's tax return ☐

Your bank account and routing numbers ☐

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