



PERSONAL CHECKLIST

TAX YEAR 2025

Whether you're not sure if you have everything you need to file your taxes or you just find satisfaction in checking off those little boxes - here's a handy checklist to help get you ready for your personal taxes.

Personal Information & Income

- ☐ You'll need the full legal name, date of birth, Social Security number, driver's license for yourself, your spouse and any dependents along with a copy of last year's tax return.
- ☐ Any W-2 forms for yourself and/or your spouse for every job you/they had in 2025 and/or any 1099 forms if either of you were self-employed (that includes any money you made as an Uber driver or Instacart delivery person).
- ☐ Unemployment Income you received or State/Local Tax Refund amounts that are taxable (1099-G forms)
- ☐ Investment or interest income you received (1099-B, 1099-DIV, 1099-INT, or Schedule K-1 forms)
- ☐ Pension, IRA or Annuity account money you took out (1099-R forms)
- ☐ Social Security or Railroad Retirement Board income you received (SSA-1099 or RRB-1099 forms)
- ☐ Trust or Estate Beneficiary income received (Form 1041 or Schedule K-1)
- ☐ HSA or Long-Term Care Reimbursements (1099-LTC)
- ☐ Any 1099-S forms from selling your house or property

Common Deductions

The standard deduction is usually enough to cover most people's deductions, but it's always good to check if itemizing will get you a bigger refund (or more off your tax bill at least!) A tax program will do the math for you, but you'll still need any of the information below to put in the amounts.

- ☐ Education expenses like itemized receipts for any qualified educational expenses, tuition statements (1098-T) or student loan interest statements (1098-E)
- ☐ Homeowner expenses like property tax payment receipts, mortgage interest statements (1098) or energy efficient upgrade receipts (your installer might provide Form 5695)
- ☐ Detailed list of donations, receipts for money contributions, and Form 1098-C for vehicle donations (or a confirmation letter instead)
- ☐ Records of any self-employment business or home office expenses, assets, health insurance payments, or receipts for estimated tax payments you made (State or Federal)
- ☐ Child or dependent care expense receipts, including the name, address & tax ID or Social Security number of the provider
- ☐ Health care expenses like medical or dental costs, including any 1095 forms you received proving that you, your spouse or family had health care coverage
- ☐ Receipts for any job-related educational expenses
- ☐ IRA Contributions (Form 5498)
- ☐ Health Savings Account (HSA) contributions (Form 5498-SA)