



TAX FILING CHECKLIST

This checklist is intended solely for informational purposes and does not constitute tax, legal or financial advice. The content provided here is not a substitute for professional advice from a qualified tax advisor, attorney or financial planner. Readers are encouraged to consult with a licensed tax professional or legal advisor to obtain advice tailored to their specific circumstances and ensure compliance with applicable laws and regulations.

With the April 15 deadline approaching, now's the time to get organized.

GATHER YOUR DOCUMENTS

- ☐ W-2s, 1099s, investment income and other income records
- ☐ Deduction and credit-related documents (mortgage interest, student loan interest, medical expenses, etc.)
- ☐ Business or self-employment income and expense records

DECIDE HOW YOU'LL FILE

- ☐ Streamline your filing with tax software
- ☐ Consider hiring a tax professional for complex returns
- ☐ Know the drawbacks of paper filing, like longer processing times and increased risk of errors

RESEARCH AND IDENTIFY TAX BREAKS YOU COULD BE ELIGIBLE FOR

- ☐ Consider contributing to an IRA or HSA to lower your taxable income
- ☐ Review potential deductions and credits (EITC, Child Tax Credit, Home Office Deduction, etc.)
- ☐ Finalize any charitable donations, education-related expenses, EV purchases, etc. to take advantage of available tax incentives

DOUBLE-CHECK FOR ERRORS AND FILE

- ☐ Review for common mistakes (missed income, incorrect deductions)
- ☐ Verify name, Social Security number and bank details
- ☐ Confirm direct deposit information if expecting a refund

PAY WHAT YOU OWE (OR SET UP A PAYMENT PLAN)

- ☐ Pay taxes online at IRS.gov or via direct withdrawal by April 15 to avoid penalties
- ☐ If you can't pay in full, you can apply for an IRS Installment Plan

IF YOU NEED MORE TIME, FILE AN EXTENSION

- ☐ Consult a tax professional for more information on filing an extension

TRACK YOUR REFUND OR PAYMENT

- ☐ Use "Where's My Refund?" on IRS.gov for updates
- ☐ Save a copy of your tax return for your records

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