

Signed 2 Action - Tax Prep Made Simple Checklist

Free educational resource from Signed 2 Action.

- Personal Information: Government ID, Social Security numbers, birth dates, bank account for direct deposit.
- Income Documents: W-2s, 1099s, SSA-1099, unemployment, retirement, investment statements.
- Business Owners: Profit & Loss, expense summary, mileage log, asset purchases, home office records.
- Deductions: Mortgage interest, property taxes, charitable donations, medical expenses (if applicable), education expenses.
- Credits: Childcare expenses, dependent information, education credits, energy-efficient home improvements.
- Before Your Appointment: Prior-year return, IRS letters, identity protection PIN (if applicable), questions for your preparer.
- Final Review: Verify names, addresses, banking information, and signatures.

Disclaimer: This resource is for educational and organizational purposes only and is not legal, tax, accounting, or financial advice.