

Individual Tax Preparation Checklist

Individual Tax Guides | Checklist | Tax year 2025 | Updated October 15, 2026

Gather the income, identity, and supporting records you need before preparing a personal return.

Who should use this resource?

Designed for individual readers who want to organize records and prepare informed questions.

What this resource covers

1. Confirm names and taxpayer identification numbers for everyone on the return
2. Collect W-2, 1099, and other income statements
3. Group records for deductions and credits you intend to review
4. Check prior-year return and withholding information
5. Make a list of missing documents before filing

How to use it

Work through each item using your own records. Mark items complete as you gather documents or finish a review. Keep original source records securely and check current instructions before filing or paying taxes.

Review checklist

- ☐ Confirm names and taxpayer identification numbers for everyone on the return
- ☐ Collect W-2, 1099, and other income statements
- ☐ Group records for deductions and credits you intend to review
- ☐ Check prior-year return and withholding information
- ☐ Make a list of missing documents before filing

Common mistakes to avoid

Do not rely on an earlier year's rule, estimate figures without source documents, or treat this worksheet as an official tax form. Verify current instructions before filing or paying.

Official references

IRS: Gather your documents: <https://www.irs.gov/filing/gather-your-documents>

NetFintax educational material. Not an official IRS or Nevada form. Requirements and eligibility depend on your facts and

current law; consult official instructions or a qualified professional before acting.