

Personal Tax Document Organizer

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

A simple filing system for income statements, payments, and supporting records.

Who should use this resource?

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

What this resource covers

1. Create folders for identity, income, adjustments, deductions, and payments
2. Record the source and receipt date of each document
3. Track outstanding forms without storing sensitive numbers in the organizer
4. Compare your list with the previous year's return

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

- ☐ Create folders for identity, income, adjustments, deductions, and payments
- ☐ Record the source and receipt date of each document
- ☐ Track outstanding forms without storing sensitive numbers in the organizer
- ☐ Compare your list with the previous year's return

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>

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