

Tax Filing Status Guide

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

Questions to discuss when choosing the filing status that matches your circumstances.

Who should use this resource?

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

What this resource covers

1. Record marital status as of the end of the tax year
2. Note household members and support you provided
3. Review the IRS descriptions of the five filing statuses
4. Ask a preparer to resolve complex household or dependent situations

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

- ☐ Record marital status as of the end of the tax year
- ☐ Note household members and support you provided
- ☐ Review the IRS descriptions of the five filing statuses
- ☐ Ask a preparer to resolve complex household or dependent situations

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: Filing status: <https://www.irs.gov/filing/filing-status>

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