

# TAX PREPARATION CHECKLIST

for First-Time Taxpayers

## THE NUMBERS YOU'LL NEED

1. Your social security number
2. Your Employment Identification Number (EIN), if you're filing for a business
3. Your spouse's social security number, if you're married
4. The social security numbers of any children or dependents



## THE TAX DOCUMENTS TO GATHER

1. W2 forms
2. 1099-MISC forms
3. Forms that show investment income, such as 1099-INTs and K-1s



## THE QUESTIONS TO ASK

Consider all additional costs and expenses from the last calendar year, which could be deductible.

These may include:

1. Alimony payments
2. Education and childcare costs
3. Charitable donations
4. Medical and dental expenses
5. Transportation expenses related to business or volunteering



**Once you've completed this year's taxes, print a copy on your Canon printer.  
File this list and all the paperwork away, in case you need it in the future.**

*Note: While this list covers many common tax topics for first-time filers, every person has different tax needs and may need to supply additional information to the IRS. Feel free to modify the list to fit your own personal tax situation.*