

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 **MegaTank G4210 printer**. File this list and all the paperwork away, in case you need it in the future.