



# FILING YOUR TAXES 101

**Let's get this tax return done in record time.**

## **Step 1: Get your personal information together.**

Write down birth dates and tax identification numbers\* for you and everyone in your household (if applicable).

Single filers with no dependents, you'll only need your own information.

**NAME**

**BIRTH DATE**

**TAX ID NUMBER\***

_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

\*A tax identification number can be a Social Security number, an Individual Taxpayer Identification Number (ITIN), or Adoption Taxpayer Identification Number (ATIN).

Some states require you to provide information from a state-issued photo ID, such as a driver's license. So you'll want to have that close by as well.

## Step 2: Gather your income documents.

During January and February, you'll receive all the income documents and forms you need to file your taxes. These will either arrive in the mail or be made available online.

**Check the boxes below when you have access to the forms\*:**

- Form W-2 (You'll get one from each employer if you work multiple jobs.)**
  - Form 1099-MISC (You'll get this if you were paid at least \$600 in business-related items like rent, medical payments, and others)**
  - Form 1099-NEC (Nonemployee Compensation for freelance jobs and independent contracting)**
  - Form 1099-INT (bank account interest statements)**
  - 1099-R / 1099-SSA (Distributions from pensions, retirement plans, IRAs, social security, etc.)**
  - 1099-G (Unemployment compensation)**
- Other records of income:** \_\_\_\_\_

\*Your tax situation may not require some of these documents. For more info on what each document is used for, check out our Tax Guide at [www.1040.com/Tax-Guide](http://www.1040.com/Tax-Guide).

## Step 3: Gather income adjustment records.

Income adjustments, or above the line deductions, are tax breaks that reduce your taxable income without requiring you to itemize your deductions.

**Check the boxes below when you have the listed info\*.**

- IRA contributions**
- Contributions to a self-employed pension plan**
- Form 1098-T for tuition paid**
- Form 1098-E for student loan interest paid**
- Self-employed health insurance payment statements**
- Any receipts for qualified classroom expenses (for teachers)**

\*You may not have some of these documents due to your tax situation. For more info on what each document is used for, check out our Tax Guide at [www.1040.com/Tax-Guide](http://www.1040.com/Tax-Guide).

## **Step 4: If you want to itemize your deductions, you'll need additional records.**

These can include receipts for qualified medical expenses, receipts of charitable donations (whether in cash or donated property), and mortgage interest statements (1098s).

DEDUCTION

RECORDS

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## Step 5: Find out your filing status.

We help you figure this out when you file with 1040.com, but if you'd like to find out for yourself, check out our Tax Guide at [www.1040.com/Tax-Guide](http://www.1040.com/Tax-Guide).

### Check your filing status:

- Single**
- Head of household**
- Married filing jointly**
- Married filing separately**
- Qualifying widow/widower**

## Step 6: Want to direct deposit your refund?

Make sure you have your routing and account numbers handy so that your refund can go straight into your bank account as soon as it's approved.

**ROUTING NUMBER** # \_\_\_\_\_

**ACCOUNT NUMBER** # \_\_\_\_\_

If you're not sure that the numbers you have are correct, check with your bank before you enter them at checkout.

## Step 7: Have a copy of last year's income tax return handy.

It's always good to have on hand as a reminder of what you filed last year, and because you'll need your prior-year adjusted gross income (AGI) to authenticate your identity when you e-file your return. If you filed with 1040.com last year, we'll have this available when you need it.

**PRIOR-YEAR AGI** \$ \_\_\_\_\_

## Step 8: File with the Feel-Good Tax Company

When you file with 1040.com, you can get your taxes done in one sitting for \$25—and do some good for the world while you're at it.

Want more info on our give back? Check out our relationship with Healing Waters International at [www.1040.com/impact](http://www.1040.com/impact).

