

Tax Document Checklist

Organize tax documents before preparing records or meeting a professional.

Checklist

<input type="checkbox"/> Income forms	<input type="checkbox"/> Expense receipts
<input type="checkbox"/> Bank statements	<input type="checkbox"/> Mileage records
<input type="checkbox"/> Donation records	<input type="checkbox"/> Prior return

Follow-up actions

Action	Owner	Due date	Done

Notes

Notes

For organization only. This printable is not tax advice. Consult a qualified professional for tax decisions.