First-Time Tax Filing Checklist – Single Filers

Stay organized, maximize your refund, and file stress-free!

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Step 1: Filing Status

- ☐ Confirm Single or Head of Household
- ☐ Check if someone else can claim you
- ☐ Review standard deduction ($15,750)
- ☐ Use IRS "Do I Need to File?" tool

Tip: Even if not required, filing may allow a refund.

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Step 2: Gather Documents

- ☐ W-2 / 1099 forms (NEC, K, INT)
- ☐ 1098-E / 1098-T (student loan/tuition)
- ☐ Receipts: charitable donations, medical, childcare, mortgage
- ☐ Expense records if self-employed

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Step 3: Confirm Dependents & Credits

- ☐ Verify eligible dependents
- ☐ Check eligibility for:
  - Child Tax Credit
  - Dependent Care Credit
  - Credit for Other Dependents

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Step 4: Deductions & Credits

Deductions:

- ☐ Standard
- ☐ Itemized (medical, donations, mortgage interest, etc.)

Credits such as:

- ☐ EITC
- ☐ American Opportunity / Lifetime Learning
- ☐ Saver's Credit
- ☐ Self-employed health insurance

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Step 5: How to File

- ☐ E-file via trusted software
- ☐ Paper forms (optional)
- ☐ Hire tax professional if complex
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Step 6: Avoid Mistakes

- ☐ Name & SSN match IRS records
- ☐ Include all income
- ☐ Bank info correct for refund
- ☐ Sign your return

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Step 7: Organize for Next Year

- ☐ Keep digital & print copies
- ☐ Store records 3–7 years
- ☐ Track income & expenses

Bonus Tips:

- 📅 File before April 15
- 💰 Track expenses for deductions
- 💻 E-file to reduce errors
- 📝 Double-check your return

Resources:

- IRS What's My Filing Status
- IRS Tax Withholding Estimator Tool
- DIY Tax Software
- Expert Help from FileTax.com

FileTax.com