Tax Forms Checklist

Use this simple worksheet to create your personalized Tax Forms Checklist to keep track of all your incoming tax information. Individually list all the accounts and employers you expect to receive 1099(s), 1098(s) and additional forms for information returns reported to the IRS.

Received	Scanned	Filed	Form #	Account, Employer or Company

Notes

☐ Keep in Notebook or
☐ Tax Forms folder

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