



# The Mid-Year Tax Document Checklist

*Gather these items to see exactly where you stand before December 31st.*

## 1. Income Verification

- Paystubs:** Your most recent stub for all jobs held this year (to check year-to-date withholding).
- Side Hustle Records:** Summary of income from freelance work, consulting, or platforms like Uber/Airbnb.
- Investment Statements:** Mid-year reports for brokerage accounts showing realized gains or losses.

## 2. Potential Deductions & Credits

- Charitable Receipts:** Digital or paper receipts for any donations (monetary or goods) made since January.
- Medical Expenses:** A running total of out-of-pocket medical, dental, or vision costs.
- Childcare Costs:** Invoices or receipts from providers, including their **Tax ID (EIN)** or Social Security number.
- Education Expenses:** Records of tuition payments or student loan interest paid.

## 3. Business & Self-Employed Records

- Mileage Log:** Updated record of business-related trips.
- Home Office Expenses:** Utility bills and square footage details if you've started working from home full-time.
- Major Purchases:** Receipts for equipment, software, or furniture bought for your business.

## 4. Life Changes (The "Big Three")

- Family Status:** Records related to marriage, divorce, or a new dependent.
- Real Estate:** Closing disclosures from a home sale or purchase.
- Retirement:** Statements showing contributions to your 401(k), IRA, or HSA.