



**TaxBraix.com**

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## **Last-Minute Tax Filing Checklist**

### **Personal Information**

- Full legal name spelled correctly
- Social Security number / Tax ID verified
- Spouse information accurate (if applicable)
- Dependent names and tax IDs confirmed
- Correct filing status selected
- Current address entered correctly

### **Income Verification**

- All employment income included
- Freelance or contract income reported
- Side hustle earnings included
- Investment income entered (interest, dividends, capital gains)
- Rental income reported (if applicable)
- Government payments reviewed

### **Deductions and Credits**

- Standard vs. itemized deduction reviewed
- Charitable donations entered accurately

- Business expenses categorized correctly
- Education expenses verified
- Medical expenses reviewed (if applicable)
- Child-related credits confirmed
- Earned income or other credits checked

## **Self-Employment Review (If Applicable)**

- Gross income correctly reported
- Expenses supported by documentation
- Mileage calculated from records
- Home office calculation reviewed
- Estimated tax payments entered

## **Refund or Payment Details**

- Routing number verified
- Account number confirmed
- Correct account type selected
- Payment amount reviewed (if taxes owed)

## **Final Submission Review**

- Return signed (electronically or physically)
- All required forms attached
- Correct tax year forms used
- Copy of return saved
- Submission confirmation stored