Tax Papers to Keep Together All Year

Drop each of these 12 papers into one folder as it arrives, and tax time gets much easier.

1. **W-2s from every employer** ☐
   They arrive in January.
2. **1099 forms** ☐
   For freelance, interest, dividends and other income.
3. **Last year's tax return** ☐
   Useful for reference.
4. **Mortgage interest statement** ☐
   Form 1098, if you own a home.
5. **Property tax bills** ☐
   If you own.
6. **Charitable donation receipts** ☐
   Keep a receipt for each gift.
7. **Medical expense receipts** ☐
   Only matters if you itemize.
8. **Student loan interest statements** ☐
   Form 1098-E.
9. **Childcare receipts** ☐
   Keep the provider's tax ID.
10. **Business or side-job expenses** ☐
    Receipts and mileage logs.
11. **Health insurance forms** ☐
    Form 1095 if you received one.
12. **Estimated tax payments** ☐
    Dates and confirmation numbers.

General guidance, not legal or tax advice. Rules and needs vary. Check with a tax professional for your situation.