

Money Habits

For Me



Money Habits Tax Documents Organizer

Use this organizer to keep track of tax documents throughout the year. A little organization now can save time, reduce stress, and help prevent missed deductions, credits, or income reporting later.

Income Documents

Document	Received	Location / File Name	Notes
W-2 Wage Statements			
1099-INT Interest Income			
1099-DIV Dividend Income			
1099-B Investment Sales			
1099-R Pension or Retirement Income			
SSA-1099 Social Security Benefits			
1099-NEC or 1099-MISC			
Other Income Documents			



Retirement Documents

Document	Received	Location / File Name	Notes
Traditional IRA Contributions			
Roth IRA Contributions			
401(k), 403(b), or TSP Statements			
Required Minimum Distribution Records			
HSA Contribution Records			
HSA Distribution Records			

Homeownership Documents

Document	Received	Location / File Name	Notes
Mortgage Interest Statement (1098)			
Property Tax Records			
Home Improvement Records			
Home Sale Documents			

Deductions and Credits

Document	Received	Location / File Name	Notes
Charitable Donation Records			
Education Expense Records			
Student Loan Interest Statement			
Dependent Care Records			
Other Deduction Documentation			

Investment Records

Document	Received	Location / File Name	Notes
Brokerage Statements			
Savings Account Statements			
CD Statements			
Cryptocurrency Records			

Business or Side Income Records

Document	Received	Location / File Name	Notes
Income Records			
Expense Receipts			
Mileage Logs			
Business Bank Statements			
Estimated Tax Payment Records			

Tax Professional Information

Name: _____

Preferred Contact Method:

Phone: _____

Email: _____

Notes: _____

Year-End Review Checklist

- ☐ Confirm all tax documents have been received.
 - ☐ Review all income sources.
 - ☐ Review deductions and credits.
 - ☐ Organize supporting documentation.
 - ☐ Schedule tax preparation or filing date.
 - ☐ Keep a copy of your completed return.
 - ☐ Save a digital copy of your completed tax return and supporting documents.
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Money Habits Resource Library

Small steps. Better habits. Stronger financial confidence.

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