

# First-Time Tax Filing Checklist – Single Filers

Stay organized, maximize your refund, and file stress-free!

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## Step 1: Filing Status

- Confirm Single or Head of Household
- Check if someone else can claim you
- Review standard deduction (\$16,100)
- Use IRS “Do I Need to File?” tool

**Tip:** Even if not required, filing may allow a refund.

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## Step 2: Gather Documents

- W-2 / 1099 forms (NEC, K, INT)
- 1098-E / 1098-T (student loan/tuition)
- Receipts: charitable donations, medical, childcare, mortgage
- Expense records if self-employed

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## Step 3: Confirm Dependents & Credits

- Verify eligible dependents
- Check eligibility for:
  - Child Tax Credit
  - Dependent Care Credit
  - Credit for Other Dependents

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## Step 4: Deductions & Credits

### Deductions:

- Standard
- Itemized (medical, donations, mortgage interest, etc.)

### Credits such as:

- EITC
- American Opportunity / Lifetime Learning
- Saver’s Credit
- Self-employed health insurance

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## Step 5: How to File

- E-file via trusted software
- Paper forms (optional)
- Hire tax professional if complex

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## Step 6: Avoid Mistakes





- Name & SSN match IRS records
- Include all income
- Bank info correct for refund
- Sign your return

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## Step 7: Organize for Next Year

- Keep digital & print copies
- Store records 3–7 years
- Track income & expenses

## Bonus Tips:

-  File before April 15
-  Track expenses for deductions
-  E-file to reduce errors
-  Double-check your return

## Resources:

- [IRS What’s My Filing Status](#)
- [IRS Tax Withholding Estimator Tool](#)
- [DIY Tax Software](#)
- [Expert Help from FileTax.com](#)

 **FileTax.com**