

Tax Preparation Checklist

Made and Supported in the USA
Get Ready for Your Maximum Refund – Easy, Fast, Secure

01



PERSONAL INFORMATION

Before you begin, make sure you have:

- Social Security Numbers for you, your spouse, and dependents.
- Valid ID (Driver's License, State ID, or Passport).
- Bank Account and Routing Number for direct deposit of refunds.

💡 Did You Know?

You can pay for your tax filing service with your refund! No need for a credit card upfront.

💡 Did You Know?

Unlike other tax software, **FileYourTaxes.com** charges no hidden fees or surprise upgrades, so you're always getting the best service upfront.

INCOME DOCUMENTS

Ensure your tax return is accurate!

- W-2s from all jobs. (if applicable) and W-2G forms for any gambling winnings.
- 1099 Forms for freelance or side gig income.
- SSA-1099 for Social Security benefits.
- 1099-R for retirement or pension income.
- Investment income statements and all other Income documentation you may have/or received (1099-INT, 1099-DIV).



02

DEDUCTIONS AND CREDITS

Ensure you have everything you need to claim the deductions and credits you deserve:

- Mortgage Interest (1098).
- Medical Expenses (for itemized deductions).
- Charitable Donation Receipts.
- Education Costs (1098-T and student loan interest statements).



03

04



SELF-EMPLOYED OR BUSINESS INCOME

To maximize deductions, make sure you have:

- Profit and Loss Statement.
- Receipts for Business Expenses (supplies, equipment, home office costs).
- 1099-NEC for payments from clients.
- Record of Estimated Tax Payments (if applicable).

💡 Did You Know?

You'll never see ads or upsell offers while using **FileYourTaxes.com**. We're all about getting you through the process as fast and smoothly as possible.

Tax Preparation Checklist

When Will I Get My Tax Refund in 2025?

We know you want your refund fast, so here's what to expect for your 2024 tax returns filed in 2025:

- Filing Your Return:** As soon as you have all your tax documents, e-file to get your refund fast.
- Return Received:** The IRS typically processes e-filed returns within 24-48 hours.
- Refund Approved:** 9 out of 10 e-filed refunds are typically approved within 21 days. Delays can happen if there are any issues.
- Refund Sent:** Direct deposit refunds arrive within a few days of approval, but paper checks take longer.

2025 Estimated Refund Schedule

This is an **estimated timeline** to help you anticipate when your 2025 tax refund may arrive. These dates are based on historical IRS processing times and are provided as a general guide:

If IRS Accepts Your E-file By	Estimated Direct Deposit Date
January 31, 2025	February 21, 2025
February 7, 2025	February 28, 2025
February 21, 2025	March 13, 2025
March 6, 2025	March 27, 2025
March 20, 2025	April 10, 2025
April 3, 2025	April 24, 2025
April 15, 2025	May 6, 2025

Helpful Tips to Get Your Refund Faster:

- E-file early and double-check your info to avoid delays.
- Use **direct deposit** for the fastest refund.
- Track your refund status using the IRS **Where's My Refund Tool** at [IRS.gov/refunds](https://www.irs.gov/refunds).

💡 Did You Know?

Using **direct deposit and e-filing** is the quickest way to get your refund. You can also track your refund status using the IRS **Where's My Refund Tool** at [IRS.gov/refunds](https://www.irs.gov/refunds).

Important Disclaimer: These dates are estimates and should only be used as a general guide. Actual refund timing may vary based on when you file your return, whether it contains errors, whether additional documentation is required, or if you claim specific credits (e.g., Earned Income Tax Credit). The IRS typically issues most refunds within 21 days of accepting the return, but this timeline is not guaranteed. For the most current information regarding your refund, including IRS processing updates, visit the IRS Operations: Status of Mission-Critical Functions page.