

For W-2 Employees & Families

FEBRUARY TAX FORM Tracker

1. TRACK YOUR INCOMING FORMS

Don't file until every form is in hand.

- ☐ W-2 received from every employer you worked for in 2025.
- ☐ 1099-NEC or 1099-MISC for any freelance or side gig income.
- ☐ 1099-INT from your bank (even for small amounts).
- ☐ 1099-DIV from investment accounts.
- ☐ 1099-R for any retirement distributions.

2. CHECK YOUR DEDUCTION FORMS

These are easy to overlook — don't skip them.

- ☐ Form 1098 for mortgage interest (from your lender).
- ☐ Form 1098-E for student loan interest.
- ☐ Form 1098-T for college tuition (you or a dependent).
- ☐ Form 1095-A/B/C for health insurance verification.
- ☐ Charitable donation receipts (cash and non-cash).

3. THE "DID I FORGET THIS?" CHECK

No form required doesn't mean no tax owed.

- ☐ Crypto sales, trades, staking rewards, or airdrops.
- ☐ Gambling or fantasy sports winnings.
- ☐ Side gig income under \$600 (still taxable).
- ☐ Rental income from Airbnb or informal arrangements.
- ☐ Cash payments: tutoring, babysitting, handyman work.

For W-2 Employees & Families

FEBRUARY TAX FORM Tracker

4. VERIFY YOUR W-2

One wrong box can delay your refund.

- ☐ Box 1 (Wages) matches your final December pay stub.
- ☐ Box 2 (Federal Tax Withheld) matches your records.
- ☐ Box 12 codes are correct (401k contributions, HSA, etc.).
- ☐ Your Social Security number and name are spelled correctly.
- ☐ Request a W-2c immediately if anything is wrong.

5. GATHER YOUR ID & FILING INFO

A rejected e-file is an avoidable delay.

- ☐ Social Security cards for yourself, spouse, and dependents.
- ☐ IRS Identity Protection PIN (IP PIN) if you've been issued one.
- ☐ Previous year's AGI for e-file identity verification.
- ☐ Childcare provider's name, address, and tax ID.
- ☐ Driver's license info (some states require it for e-filing).

6. SET UP YOUR REFUND

Double-check before you hit submit.

- ☐ Confirm your bank name, routing number, and account number.
- ☐ Verify the account type: checking or savings.
- ☐ Consider splitting your refund (Form 8888) into multiple accounts.
- ☐ Don't throw away "informational" letters from the IRS.
- ☐ Wait for any corrected forms before filing — they trickle in through March.

TaxQuotes

www.taxquotes.com



EVERY FORM. EVERY DOLLAR.

We make sure nothing's missing so your refund lands exactly where it should.

