

get ready

Collect all the stuff
Tax forms + cover sheets
Biz essential #s

Get favorite
treats/bevvies

Optional:
Get a buddy

set...

Make a cozy
workspace

Choose a
Reward!

Choose/confirm
filing program

**Get
Started**

Log-in
Personal Info

file!

**All
Income**

PERSONAL

BUSINESS

A

B

**Health
Insurance**

C

**Deductions
+ Credits** PERSONAL
Est. Quarterly \$

D

**Review
+ Submit**



[Save this section for IRS Prep Step #5]

finish strong

Archive

Reflect +
Revise

Reward!

Filing Your IRS Taxes / A JGF Companion Guide



get ready

Collect | All your tax forms - with their Cover sheets and your Essential #s

Get some favorite treats/bevies | Keep yourself fueled and motivated! The brain needs glucose for will power and focus

Optional. Get a buddy | This can be a huge level-up! It's so helpful to have a 2nd set of eyes for thoroughness and problem solving, and generally for motivation, and for high fives!

set...

Make a cozy workspace | Tend to your body's needs, so you want to be here, and it's easy to work.

Choose a Reward | This is key! Make it a good one, so that your system learns to like working on this stuff! Did you pick one already? Great? If not, what do you want to choose? _____

Choose/confirm filing program | Some options: TurboTax - costs \$120+, great graphics and support; Freetaxusa - free, simple, straightforward; H&R Block - \$115+, decent graphics, help available at branches

file!

Get Started Log-in Personal Info

♡ Take a moment to get oriented. Look at the navigation, and find where the help is located. The program will often use questions to create pathways to take you on. Note - if you are filing "Married Filing Jointly" - you'll need to add your partner's info too. You can do later, if needed.

♡ Every program goes in a different order, and has its own terminology. Use your Cover Sheets and Essential #s sheet to keep track! Mark things off as you go. If the program skips something that you need to enter, do a search to take you to the matching section.

All Income PERSONAL BUSINESS

♡ PERSONAL - Enter any income not related to your business

♡ BUSINESS / INCOME Did you get any 1099 forms related to your biz? If yes, you'll need to enter them one at a time. Then, if you had any payments not on the forms, you'll enter that number separately, in "Other Payments". After you enter them all in, check to see if the total amount matches yours. Note, 1099-K forms sometimes take special care.

♡ BUSINESS / DEDUCTIONS You might need to select the categories. If you don't see all of the ones on your list, you can search for them, or manually add them in the "Other" section. The biz section may prompt you for health care costs - check the note below. There are usually extra sections for Mileage/Biz use of Vehicle, and Home Office.

Health Insurance

♡ Did you get health insurance from the Marketplace? Such as the WA Health Exchange? If yes, you'll need to enter your 1095-A. Important! Check the instructions on when + where to add your health insurance costs. This can be a bit tricky.

Deductions + Credits PERSONAL Est. Quarterly \$

♡ This section is about getting your tax bill down! It will look for personal "tax breaks" for you (not related to your biz). It may ask you all kinds of questions, looking to see if you have more deductions or credits. If you "Itemize", this is where you'll enter all of those forms/info.

♡ Important! If you paid Estimated Quarterly Tax Payments, you'll need to enter them somewhere in this section. If the program doesn't lead there, search for it.

Review + Submit

♡ The program may run a check for you, to see if your filing is complete, and if it has any risk areas. Optional: sometimes you can generate a PDF of the whole form, as a way to check on some things yourself, before you file.

♡ You will also need to sign it, add info about your ID, and arrange for any payments or refunds. ProTip: Immediately download your 1040 PDF and store somewhere safe. Bonus: Take a look at it, to review your #s, or just out of curiosity! Especially your Schedule C form!

You did it! Woohoo!