



7-Minute Tax Fit Checklist

Uncover \$200–\$500 in Hidden Tax Savings

Gather Your Documents

- W-2s from all employers
- 1099s (side gigs, contract work, investments)
- Last year's tax return

Review Your Deductions

- Charitable donations (church, nonprofit, GoFundMe)
- Medical expenses (out of pocket, prescriptions)
- Student loan interest
- Job-related expenses (union dues, uniforms, mileage)

Credits Most People Miss

- Earned Income Tax Credit (EITC) eligibility check
- Child Tax Credit (including dependents over 17 partial credit)
- Education credits (Lifetime Learning, American Opportunity) with Form 8863

Maximize Your Refund

- Check if you overpaid on your W-4 withholding
- Ensure dependent info matches Social Security records
- File electronically for faster refund turnaround
- Split refund: direct deposit into both checking and savings