

Gather and organize tax records for the 2023 taxation year

[Organized tax records](#) make preparing a complete and accurate tax return easier. They help avoid errors that lead to processing delays that slow refunds. Having all needed documents on hand before taxpayers prepare their return helps them file it completely and accurately. This includes:

- [Forms W-2](#) from employers
- Forms 1099 from banks, issuing agencies and other payers including [unemployment compensation](#), [dividends](#), distributions from a [pension, annuity or retirement plan](#)
- [Form 1099-K](#), [1099-MISC](#) or [1099-NEC](#), or other income statement for workers in the [gig economy](#)
- Form [1099-INT](#), for [interest received](#)
- Other income documents and records of [virtual currency](#) transactions
- [Form 1095-A](#), *Health Insurance Marketplace Statement*, to reconcile advance premium tax credits for Marketplace coverage

Taxpayers should also gather any other documents from earnings. People should keep copies of tax returns and all supporting documents for at least three years. Income documents can help taxpayers determine if they're eligible for deductions or credits.

Confirm mailing and email addresses and report name changes

To make sure forms make it to your tax preparer on time, taxpayers should confirm now that each employer, bank and other payer has their current mailing address or email address. People can report address changes by completing [Form 8822](#), *Change of Address* and sending it to the IRS. Taxpayers should also notify the postal service to forward their mail by going online at [USPS.com](#) or their local post office. They should also notify the [Social Security Administration](#) of a legal name change.

View account information online

Individuals who have not set up an [IRS Online Account](#) yet should do so soon. People who have already set up an Online Account should make sure they can still log in successfully. Taxpayers can use Online Account to securely access the latest available information about their federal tax account.

Review proper tax withholding and make adjustments if needed

Taxpayers may want to consider [adjusting their withholding](#) if they owed taxes or received a large refund in prior years. Changing withholding can help avoid a tax bill or let individuals keep more money each payday. Life changes – getting married or divorced, welcoming a child or taking on a second job – may also be reasons to change withholding. Taxpayers might think about completing a new Form W-4, Employee's Withholding Certificate, each year and when personal or financial situations change.

People also need to consider estimated tax payments

Individuals who receive a substantial amount of non-wage income like self-employment income, investment income, [taxable Social Security benefits](#) and in some instances, pension and annuity income should consider making [quarterly estimated tax payments](#).