



Checklist for 2025 Tax Returns

Check all that apply:

Income

- ☐ Wages (Form W-2)
- ☐ Interest Income (Form 1099-INT)
- ☐ Dividend Income (Form 1099-DIV)
- ☐ Investments/Stocks Sold (Form 1099-B)
- ☐ Real Estate/Home Sold (Form 1099-S)
- ☐ Assets Sold (Cars, Coins, Collections)
- ☐ Social Security (Form SSA1099)
- ☐ Retirement/IRA Distributions (Form 1099-R)
- ☐ Self Employed / Side Hustle business income (Form 1099-NEC & 1099-Misc)
- ☐ Payment Card Transactions (Form 1099-K)
- ☐ S-Corporation Income (Schedule K-1)
- ☐ Partnership Income (Schedule K-1)
- ☐ Trust & Estate Income (Schedule K-1)
- ☐ Rental income and expenses
- ☐ Farming & Cattle Income (Form 1099-PATR)
- ☐ Oil & Gas Income (Form 1099-Misc)
- ☐ Unemployment (Form 1099-G)
- ☐ Medical or HSA Distributions (Form 1099-SA)
- ☐ Educational Distributions (Form 1099-Q)
- ☐ Gambling/Lotto Winnings (Form W-2G)
- ☐ Cancellation of Debt/Mortgage (Form 1099-C)
- ☐ **New** - Digital Asset Transactions (1099-DA)
- ☐ Alimony Received (If divorce before 2019)
- ☐ Other Income (if not listed above)

Check all that apply:

Tax Deductions**

- ☐ Educator Expenses (Paid by Teachers)
- ☐ Student Loan Interest paid (Form 1098-E)
- ☐ Self-Employed Health Insurance Premiums (Paid Personally)
- ☐ Alimony Paid (If divorce before 2019)
- ☐ IRA/SEP/SIMPLE/Contributions (Form 5498)
- ☐ Medical expenses paid out of pocket for doctors, dentists, vision, etc (don't include pre-tax insurance premiums deducted from paycheck)
- ☐ Mortgage Interest (Form 1098)
- ☐ Property Taxes paid on Personally Owned Real Estate
- ☐ Energy efficient home improvements: solar panels, new A/C, doors, windows, etc
- ☐ Gambling Losses (Limited to Winnings)
- ☐ Charitable Contributions (monetary - made with cash, check or card)
- ☐ Non-Cash Charitable Contributions (donated items to Goodwill, etc)
- ☐ Childcare or after-school care expenses statement
- ☐ College Tuition expenses (Form 1098T)
- ☐ **New** - Financed a new car: provide VIN# & year-end lender statement with the interest paid
- ☐ **New** - Worked overtime: provide last 2025 paystub or overtime report

Other

- ☐ IRS IP Pin Letter with "Pin" # (If you had tax identity theft in the past)
- ☐ Copy of your Driver License or State ID
- ☐ Copy of previous year tax returns (for new clients only)
- ☐ Marketplace health insurance (Form 1095A)
- ☐ Quarterly Estimated Tax Payments (amounts paid per quarter):
Federal 1st _____ 2nd _____ 3rd _____ 4th _____
State 1 st _____ 2nd _____ 3rd _____ 4th _____

****Please note that expenses for a deduction must be paid in 2025 not just billed/incurred**