



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 1099NEC & 1099Misc)
- Payment Card Transactions (Form 1099K)
- 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**