

## 2025 Tax Preparation Checklist

New Clients	Returning Clients
<input type="checkbox"/> Driver's License or State I.D.	<input type="checkbox"/> Renewed License or State I.D.
<input type="checkbox"/> Social Security Numbers & Date of Birth for Taxpayers & Dependents	<input type="checkbox"/> Social Security Number & Date of Birth for *New Dependents
<input type="checkbox"/> Copy of Most Recently Filed Returns	<input type="checkbox"/> Banking Information if changed
<input type="checkbox"/> Banking Information	<input type="checkbox"/> Current Address if changed

### Dependents

Please provide one of the following types of forms to show proof of residency for anyone you are claiming as a dependent:

- 1095 Proof of Health Insurance
- School/Child Care Statement
- Any other similar document listing your dependent's address as being the same as your own

### INCOME FORMS

- W-2s Income from employer
- W-2 G Gambling Winnings
- SSA-1099 Social Security Statement
- 1099-G Unemployment Income or State Income Tax Refund
- 1099-R Retirement Income
- K-1 Shareholder Income from Partnership, S-Corporation, or Trust
- 1099-INT Interest Income earned from Bank or Investment
- 1099-DIV Dividend Income
- 1099-B Sale of Stock, Bonds, or other asset
- 1099-NEC Self-Employment Income

### DEDUCTIONS & CREDITS

- Home Owners → 1098 Mortgage Interest Statement & Property Tax Payment
- Renters → Total amount of rent paid
- 1099-SA (HSA) Distributions / 5498 for Contributions
- Loan Interest & VIN for purchase of new car
- Child Care Expenses / Private School Tuition Statements must include Tax ID
- 1098-T Tuition Expenses
- Charitable Donations *Include detailed listing for non-monetary donations \$500+*
- Contributions to a 529 College Savings Plan
- IRA Contributions
- Medical & Dental out-of-pocket Expenses

### OTHER MISCELLANEOUS

- 1095-A Marketplace Statement for Marketplace Policy Holders
- \*Closing Statement if you Purchased/Sold Property in 2025
- Rental Property Income & Expenses
- 1099-S Sale proceeds if you sold your primary residence or rental property
- Self-Employment Expenses
 

Expenses related to self-employment income; business mileage, supplies, partial phone/internet usage, liability insurance, home office, etc.
- Estimated Tax Payment Records - Records/Receipts for all estimated tax payments made towards 2025

### HELPFUL TIPS

- Please avoid using staples
- Please review last year's communications with us
- Please don't give us unopened mail
- Please review last year's tax documents