

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