

2025 TAX CHECKLIST

PERSONAL INCOME

1. W-2s for all jobs held during the year. If you're paid overtime, include the last paystub of 2025.
2. 1099s for self-employment, rent, retirement, disability, unemployment, gambling, social security, long-term care, tax refunds, HSAs, and other income.
3. K-1s from Partnerships, S-Corporations, Estates, or Trusts.
4. Alimony Received (pre 12/31/18 divorces).
5. Rental income & expenses.

INVESTMENT INCOME

1. 1099-INT for bank accounts, CDs, land contracts, bonds, etc.
2. 1099-DIV for stocks, mutual funds, and brokerage accounts.
3. 1099-B for sale of stocks, bonds, mutual funds, and other assets.
4. Purchase info for capital assets sold or became worthless during the year.
5. Closing Statement (HUD-1) for real estate sales, purchases, and refinances.

ITEMIZED DEDUCTIONS

1. Medical expenses (only the amount over 7.5% of your income is deductible).
2. Real Estate taxes.
3. Sales Tax - Did you purchase a car, boat, or plane this year?
4. Automobile Registration Fees.
5. Mortgage Interest (generally limited to \$750,000 of mortgage debt).
6. Charitable contributions. You are required to have a receipt or bank record to take the deduction (I don't need to see them, but you are required to have them).
7. Non-monetary charitable contributions. (Clothes, furniture, household goods, cars, etc. Items must be in good usable condition. Keep a list of items donated along with the receipt from the charitable organization.)
8. Uninsured disaster loss (federally declared disaster, exceeding 10% of income).

EDUCATION DEDUCTIONS & CREDITS

1. 1098T and account statement for college tuition & fees.
2. Has the college student ever been convicted of a felony?
3. Did you cash US savings bonds issued after 1989 to pay for tuition?
4. Scholarships received.
5. Education IRA or Coverdell contributions and withdrawals.
6. Student Loan interest.

(Continued on reverse)



CHILD RELATED DEDUCTIONS

1. If you haven't previously, provide us your children's birthdays.
2. Child Care expenses.
3. Adoption expenses.
4. Did the children live with you or someone else?

OTHER DEDUCTIONS & CREDITS

1. Educator's unreimbursed classroom expenses.
2. Did you buy a new electric vehicle prior to 9/30/25?
3. Loan interest on new American made vehicles purchased in 2025. Provide the VIN and the 1098-VLI or loan interest statement.
4. Alimony Paid (pre 12/31/18 divorces).
5. IRA, SEP, SIMPLE, or HSA contributions.
6. Did you install any energy-saving home improvements? (You should receive a certificate from the manufacturer if it is eligible for the credit.)
7. If you made estimated tax payments please provide the date and amount of each payment.

OTHER

1. **Review and sign the [client agreement](#). Make sure to circle the appropriate responses regarding foreign financial accounts & crypto.**
2. New Clients: please bring a copy of the previous year's tax return.
3. Did your address, phone, email, dependents, or marital status change?
4. Do you own or did you transact virtual currency or digital assets (e.g. Bitcoin)?
5. Medical insurance 1095s.
6. Did you start or acquire a new business?
7. Did your children have more than \$1,350 of investment income.
8. If you want direct deposit of your refund into an account different than last year, provide a void check or the account info (bank name, account type, account number, and routing number).
9. Do you have a bank or financial account in a foreign country?
10. Please note: job related expenses, professional & union dues, investment advisor fees, are no longer deductible
11. Please don't staple documents as they will need to be unstapled to be sorted and scanned. Original documents are easier to work with than photocopies. Please provide originals instead of copies. If you receive any documents as PDFs, please don't print them out, just forward the PDFs to me. Thanks.

Some aspects of your tax situation may not be covered on this brief checklist. If you prefer a more detailed questionnaire or have any questions, let me know.