

2025 Tax Year Preparation Checklist

Income Sources

- Wages (W-2s)
- Interest, Dividends, Capital Gain Distribution (1099s)
- Sales of Stock or other property including Cost Basis (1099s & Broker Statements)
- Rents and Royalties (may receive 1099)
- Alimony (need SS# and name of payer)
- Pensions, Annuities, and other Retirement Accounts (1099-R)
- Unemployment Compensation (1099)
- Social Security and Railroad Retirement Benefits (1099-S or 1099-R)
- Business and Farm Income (may have 1099-MISC and/or CCC 1099-G)
- Partnership, S Corporation, Trust and Estate Income (K-1)
- Gambling and Lottery Winnings (1099-G or W-2G)
- State and Local Income Tax Refunds
- Scholarships and Fellowships (1099)
- Other Miscellaneous Income

Possible Expenses to Reduce Taxes

- Health Care Insurance and Expenses
- Exemptions (need date of birth and SS cards for you, spouse, and dependents)
- Home Mortgage Interest and Equity Loan Interest
- Investment Interest and Expense
- Charitable Contributions (cash and non-cash property)
- Out-of-Pocket Expenses and Mileage for Volunteer Services
- Child and Disabled-Dependent Care Expenses (need providers Tax ID#)
- Traditional or Roth IRA, Keogh, SEP and SIMPLE Contributions
- Expenses for Business Use of Automobiles/Trucks
- Business Travel and Entertainment Expenses
- Alimony Paid (need recipients SS#)
- Real Estate Taxes
- Education and/or Vocational Expenses
- Estimated Tax Payments Made
- Educator Expenses
- Gambling Losses
- Sales Tax paid

Other Documents/Information I will need prior to preparing your tax return

- Proof of Identification – State Issued Driver's License or Photo ID and Social Security Cards, if I don't already have this
- Birth Certificate for child born in 2025 and/or for all children if I did not prepare your tax return in prior years
- Sell/Purchase house: Settlement statement for purchase/sale of home as well as for prior home, if this applies
- 2022, 2023 and 2024 Tax Returns (Federal, State, and Local) if I did not prepare them
- Bank Routing Numbers and Account Numbers for Direct Deposit (or a voided check) – if any changes from 2024 tax return
- Current Year's Tax information from the IRS, State, and Local Governments
- My completed forms from the packet I sent in early January