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2024/2025 Individual Tax Information Reminder Checklist

Simply bring the relevant items to the office or scan and email them. If you bring or mail originals, copies will be made as needed. The original information will be returned with your completed taxes. **THANKS** for your business!

- Copy of 2024 federal and state tax returns (if we did not prepare 2024 returns)
- Birth dates of taxpayer, spouse, and children (only if we did not prepare your 2024 tax return) including names, social security numbers, and birthdates of any newborns in 2025
- Form W-2 from all employers
- Form 1099 for interest income, dividend income, proceeds from stock transactions, gambling, investment interest expense, etc.
- Any income received from tips
- Form 1099R for early IRA distribution or other retirement plan distributions
- Form 1098 for mortgage interest, PMI insurance, and property taxes paid
- Refinancing information of mortgage (only if you paid "points")
- Rental income information – income, expenses, original cost, prior depreciation, etc.
- Income and expenses summarized by meaningful categories from any side businesses (QuickBooks back-up files if applicable)
- Information from sales of stock, mutual funds, or other significant asset (including amounts originally paid, dates purchased and sold)
- Schedule K-1's from any partnership or S-Corporation ownership
- Farm related receipts and expenses (categorized)
- Documented business mileage records
- Receipts for charitable contributions (over $250 must have letter from organization). Non-Cash contributions must be itemized and valued (IRS is cracking down on these)
- Property taxes paid during the year (real estate, personal property on vehicles, etc.)
- Amounts of 2025 sales taxes paid for big ticket items such as boats, cars, etc….
- Estimated income tax payments (amounts & dates of payments)
- College tuition paid on each student (child or adult) – **must have form 1098-T from college institution**
- If employed, any supplies or expenses not reimbursed
- Moving and/or job hunting expenses
- Home office expenses (utilities, insurance, etc.)
- Recent IRS or state tax authority correspondence
- Student loan interest paid
- Childcare payments (amount, care provider's name, address, and identification number)
- Roth IRA, regular IRA, or SIMPLE, and SEP contributions
- Medical expenses, including health insurance premiums, long-term care insurance, health savings account contributions and distributions, and prescription drugs, and Forms 1095A (if any) – received from the health insurance marketplace
- Divorce decree (if decree determines a dependency exemption for children) with alimony received/paid
- Any other items that you think may have any possible tax impact
- Email address, telephone number, and preferred time to contact you