



TAX YEAR 2025 PERSONAL RETURN CHECKLIST

Please fill in/send applicable information and return with COPIES of your other supporting documents. Provide total amount for each category; save your receipts, but please don't send actual receipts.

Previous Year's Tax Return (if we didn't prepare it)

Wage Statements

- Form W-2
Form 1099-NEC (if applicable)

Additional Income

- Interest and Dividend Income (Form 1099-INT/Form 1099-DIV) Broker 1099 Package
Unemployment Income (Form 1099-G)
Social Security Income (Form SSA-1099)
Pension/Retirement (Form 1099-R)/Railroad Retirement (Form 1099-RRB)
K-1s
Rental Property/Trusts/Estates
Alimony Received or Paid
Information on Crypto Currency Transactions

Standard Deductions: 65 and Older; or Blind:

- Single: \$15,750 Add \$2,000
Married (joint): \$31,500 Add \$1,600
Head of Household: \$23,625 Add \$2,000

Mortgage or Home Equity Loan Interest Paid (Form 1098) Real Estate and Personal Property Taxes Paid (Form 1098)

Information and SSN on Baby Born After January 1, 2025

Auto Loan Interest on New, U.S.-assembled Vehicle (enter total amount here):

Year: Make: Model: VIN:

Qualified Overtime Earnings (enter total amount here):

Qualified Tip Income (enter total amount here):

(Complete the following only if the total of all deductions are more than the standard deduction listed above.)

Medical, Eye Care and Dental Expenses (enter total amount here):

Charitable Deductions (enter total amount here):

Casualty/Theft Losses (enter total amount here):

Rental Property Expenses (enter total amount here):

IRA/Health Savings Account (HSA) Contributions (enter total amount here):

Childcare Expenses/Tuition & Education Fees (Form 1098-T) (enter total amount here):

Health Insurance (Form 1095 A-C)

State Income Tax Refund Amount (if applicable) (enter total amount here):

Record of Purchase/Sale of Residence

NEW to the checklist for 2025

Start Early!

Please give us documents early: February is best; first half of March is fine; After March 25th: filing an extension.



TAX YEAR 2025 BUSINESS RETURN CHECKLIST

Previous Year's Tax Return (*if we didn't prepare it*)

Financial Business Reports:

- Profit and loss statement
- Balance sheet including assets & liabilities
- General ledger details
- 1099s received
- 1099-K forms from third-party payment processors (Venmo, PayPal, Stripe, etc.)
- ERC amended returns, corrections, and repayments
- Rental income statements (if applicable)

Asset Information

Receipts, documents or reports related to your assets & fixed assets you've bought, sold or depreciated during last year

Loan Information

- New Loan agreement(s)
- Loan statements as of the end of the year
- Vehicle loan interest (including for mixed-use vehicles; include business-use percentage)

Statements Supporting Financials

- Bank statements
- Credit card statements
- 1098 mortgage interest & property taxes form

Other Deductible Expense Information

- Home office deduction
- Mileage log (if vehicle used for business)
- Donations
- Equipment and software purchases
- Qualified production property

Payroll data

- Copies of employees' W-2s, W-3s and 1099-NEC
- Retirement plan and health insurance payments

Ownership Changes

Provide name, social security number, and address of any new owners and effective date.
Provide date any owner made a change in ownership percentage.

Start Early!

Please give us business return documents early: *after February 16th* means filing an extension.