

# Tax Preparation Checklist

## TY 2025

### Updates: Any change in the following?

- ☐ Address ☐ Marital Status
- ☐ Cell ☐ Dependents
- ☐ Email ☐ Banking

License	ST.	DL #	Issued	Expires
Taxpayer				
Spouse				

### Childcare & Dependents:

- ☐ Dependents' Names, DOB, SSNs
- ☐ Childcare records (including the provider's tax ID number)

### Education:

- ☐ Tuition statement **1098-T**
- ☐ Student Loan Interest **1098-E**

### Income: **W-2 Forms, K-1**

### Self-Employment: **1099s (MISC, NEC, K) & Schedules K-1**

- ☐ Income / Exp. records (ask for [Realtor Expense Tracker](#))
- ☐ Mileage Log
- ☐ Self-Employed Health Insurance Premiums
- ☐ Record of estimated tax payments made (if applicable):

Quarter	State	Fed	Date
1 (Apr 15)	\$	\$	
2 (Jun 15)	\$	\$	
3 (Sept 15)	\$	\$	
4 (Jan 15)	\$	\$	

### Rental Income (ask for [Rental Property checklist](#)):

- ☐ Income / Expense records
- ☐ Closing Statements from purchase or sell of rental

### Retirement Income:

- ☐ Pension/IRA/annuity income (**1099-R**)
- ☐ Social Security/RRB income (**1099-SSA, RRB-1099**)
- ☐ IRA Contribution Information (**5498**)

### Savings & Investments: **1099-INT, 1099-DIV, 1099-B**

- ☐ Interest, dividend income (1099-INT, 1099-DIV)
- ☐ Sales of stock or other property (1099-B, 1099-S)

### Other Income

**1099-G, 1099-SA, W-2G**

- ☐ Unemployment, state tax refund (1099-G)
- ☐ Health Savings Account (1099-SA or 1099-LTC)
- ☐ Gambling income (W-2G or records showing income)
- ☐ Virtual Currency: **Form 8949** and .csv transaction report

### Other Deductions and Credits (if applicable):

- ☐ Mortgage: **Forms 1098** mortgage interest statements
- ☐ Property Tax: Real estate and personal property
- ☐ Healthcare / Medical Exp: Out-of-pocket expenses for insurance premiums, doctors, dentists, prescriptions, etc.
- ☐ Healthcare: **Form 1095-A** (Obamacare)
- ☐ **Form 5498-SA** showing HSA contributions
- ☐ Retirement Contributions (IRA ROTH, SEP, 401K)
- ☐ Charitable Contributions: cash and non-cash records  
*\*Must have statement from donee organization.*
- ☐ Car Tag: "Ad Valorem tax" on each car's registration
- ☐ Energy Efficient Tax Credits (see [OBBBA](#) for provisions)

### NEW!!! [One Big Beautiful Bill Act \(OBBBA\)](#), July 4, 2025

- ☐ Deduction for \*qualified\* [tips and overtime pay](#)
- ☐ Interest Deduction for \*qualified\* [new vehicle](#)
- ☐ Signed Engagement Letter

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