

# Tax Preparation Checklist

TY 2025

## Updates: Any change in the following?

<input type="checkbox"/> Address	<input type="checkbox"/> Marital Status
<input type="checkbox"/> Cell	<input type="checkbox"/> Dependents
<input type="checkbox"/> Email	<input type="checkbox"/> Banking

## 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 [OBBA](#) for provisions)

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

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

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)