

Client Tax Checklist for Tax Year 2025

Please provide us with details on any of the following items that pertain to you for tax year 2025:

NOTES

- ☐ **If qualified overtime pay is included but not separately identified on your W-2, please provide employer letter detailing overtime pay.**
- ☐ **If you borrowed money to buy a brand-new car during 2025 that weighs less than 14k lbs and was assembled in the USA, the interest may be deductible. Please provide VIN and interest statement.**
- ☐ Change of name w/ SSA (e.g. if recently married)
- ☐ Change of marital status
- ☐ Change of contact phone number(s)
- ☐ Change of mailing address
- ☐ Change in e-mail address
- ☐ Change of occupation
- ☐ Change of dependents
- ☐ Change of bank account for direct deposit of refund
- ☐ Cost of health insurance
- ☐ If you use your vehicle for business, please provide
 - Please provide mileage
 - Business
 - Personal
 - Commuting
 - Total
- ☐ If you sold stocks, bonds or mutual funds please provide year-end 1099s
- ☐ If you bought or sold real estate please provide a HUD-1 settlement sheet for each property
- ☐ If you paid or received alimony
- ☐ If you incurred qualified educator expenses (for teachers/administrators K-12 only)
- ☐ If you contributed to a traditional or Roth IRA please provide form 5498, if available
- ☐ If you contributed to a SEP or profit sharing plan
- ☐ If you paid student loan interest please provide form 1098-E
- ☐ If you contributed to a 529 education savings plan
- ☐ If you paid college tuition please provide form 1098-T or 1099-Q if 529 plan distribution
- ☐ **If you have an HSA plan please provide forms 1099-SA and 5498-SA**
- ☐ Provide computation of the following deductions:
 - Medical exps (if greater than 7.5% of AGI)
 - Real estate taxes (if not on mtg. stmt.)
 - Mortgage interest (if not on mtg. stmt)
 - Charitable contributions (cash & non-cash)
 - Unreimbursed job related costs
- ☐ If you incurred costs for camp/childcare (we need the care-provider names, addresses and TINs as well as the cost breakdown by provider and by child)
- ☐ If you made energy saving improvements
https://www.energystar.gov/about/federal_tax_credits
- ☐ If you paid federal and/or state estimated taxes, please provide breakdown of dates and amounts.