

TAXPAYER & SPOUSE (Last / First Name):

T A X C H E C K L I S T

INCOME

Wages or Salary (Form W-2) **Yes/No**

*****Overtime OR Tip Income? **Yes/No** LIMITS AND SPECIAL RULES APPLY

Scholarships? (Forms W-2, 1098-T) **Yes/No**

Interest/Dividends? (Form 1099-Int, 1099-Div) **Yes/No**

Refund of State/local income taxes? (Form 1099-G) **Yes/No**

Alimony Income? **Yes/No**

Self-Employment Income? (Form 1099-MISC or cash) **Yes/No**

Cash/Check payments for any work performed not reported on W-2 or 1099? **Yes/No**

Sale of Stocks, Bonds or Real Estate? (including your home) (Form 1099-S, 1099-B) **Yes/No**

Disability Income? (such as payment from insurance, or workers compensation (Form 1099-R, W-2) **Yes/No**

Distribution from Retirement Account such as Pension, Annuity, and/or IRA? (Form 1099-R) **Yes/No**

Unemployment compensation? **Yes/No**

Social Security or Railroad Retirement Benefits? (Form SSA-1099, RRB-1099) **Yes/No**

Income / Loss from Rental Property? **Yes/No**

Other Income? (gambling, lottery, prizes, awards, jury duty, Sch K-1, etc) (Forms W-2G) **Yes/No**

EXPENSES

*****Did you FINANCE the purchase a NEW passenger vehicle in 2025? **Yes/No** LIMITS AND SPECIAL RULES APPLY

Alimony? **Yes/No** If yes, do you have the recipient's SSN? **Yes/No**

Contributions to retirement account? **Yes/No** IRA _____ Roth IRA _____ 401K _____ other

Post secondary educational expenses for yourself, spouse or dependents? (Form 1098-T) **Yes/No**

Medical expenses? **Yes/No**

Home Mortgage interest? (Form 1098) **Yes/No**

Real Estate taxes for your home or personal property taxes for your vehicles? (Form 1098) **Yes/No**

*****Charitable Contributions? **Yes/No** Cash _____ Non-Cash _____ LIMITS AND SPECIAL RULES APPLY

Child or dependent care expenses such as daycare? **Yes/No**

Have Health Insurance from Marketplace? (Form 1095A) **Yes/No** (H S A) Health Savings Acct. (1099-SA) (5498 SA)

Have debt from a mortgage or credit card cancelled/forgiven by a commercial lender? (Form 1099-C, 1099-A) **Yes/No**

Buy, Sell, Refinance or have a foreclosure of your home? (Form 1099-A, Closing Statement) **Yes/No**

Pay any student loan interest? (Form 1098-E) **Yes/No**

Made estimated tax payments or apply last year's refund to this year's tax? **Yes/No** If so how much? _____

File a federal return last year containing a "capital loss carryover" on Form 1040 Schedule D? **Yes/No**

ADDITIONAL INFORMATION

Donate to Presidential Election Campaign Fund? **Yes/No** Donate \$3 **Yes/No**

Any foreign bank account? **Yes/No**

Any virtual currency transaction / account? **Yes/No**

***** NEW 2025 CHANGES