

Tax Preparation Checklist - 2025 Tax Year

- 1. Copy of both sides of your Driver's license or State ID. Joint filers need both IDs.
(Not necessary if we already have your unexpired IDs on file.)
- 2. Wage Statements (W-2) and 1099 Forms
- 3. Pension, IRA, or Annuity Statements (1099-R)
- 4. Social Security Income Statements (SSA-1099)
- 5. Interest & Dividend Income Statements (1099-INT & 1099-DIV)
- 6. Consolidated tax statements of investment income, sales, and purchases
- 7. Unemployment Income Statements. (NY State will mail them to you.)
- 8. If you received Overtime Pay, provide your last paystub of 2025.
- 9. Student Loan Interest paid
- 10. Individual Retirement Account (IRA) contributions
- 11. Education Expense Information (1098-T, and detail of expenses paid in - Call us.)
- 12. Dependent Care expenses: Amount paid for each child; Providers Name, address, Federal ID number, and amount paid to each provider
- 13. Record(s) of Estimated Tax Payments made (Federal and State), including dates paid
- 14. If you Itemize: Property Taxes, Mortgage Interest, Charitable Contributions, Medical Expenses if over 7.5% of Adjusted Gross Income
- 15. Energy related expenses: If your energy improvements include qualifying windows, doors, furnace, central air, or water heater, provide us with the Qualified Manufacturer Identification Number for each window, door, or product.
- 16. If you financed the purchase of a new car, call us or use (Ctrl+) [this link](#).
- 17. Major changes from last year.
- 18. Any other income, deductions, questions, or information you think might impact your tax return (Space for notes below and on back).
- 19. Current Phone number: _____ Best time to call: _____

**We will call you to discuss your tax information before completing your returns.
At that time we can review your situation to make sure we have all of the
necessary information to properly complete your tax forms.**

Notes:
