

## Tax Preparation Checklist 2025 For Minor/Dependent Children/Short Form

Name(s): \_\_\_\_\_ Phone: \_\_\_\_\_ / \_\_\_\_\_

E-mail: \_\_\_\_\_ DOB(s): \_\_\_\_\_ / \_\_\_\_\_ (New clients only)

In an effort to prevent Cyber Fraud, please provide: License # \_\_\_\_\_

Issue date \_\_\_\_\_ Exp Date \_\_\_\_\_ State of Issue \_\_\_\_\_

Spouse- License # \_\_\_\_\_

Issue date \_\_\_\_\_ Exp Date \_\_\_\_\_ State of Issue \_\_\_\_\_

Can someone else claim you as their dependent? YES \_\_\_ NO \_\_\_ FT Student \_\_\_\_\_

**If your taxes will result in a refund, please indicate what account you would like it to go into. If left blank, refund check(s) will be mailed to your home address**

Name of Bank	Account #
Routing #	Checking or Savings

<b>Proof of Health Care Form (form MA 1099-HC) <i>**Everyone must have this form if over age 18 unless if you are on MediCare</i></b>	
<b>Form 1095-A Health Insurance Market Place Statement (if you get your health insurance from the marketplace)</b>	
All W2s-Only one copy is needed	
All 1099-inc/divs for interest income and dividend income	
Student Loan Interest Paid statements (1098-E)-Only if you are claiming yourself	
Continuing Education Expenses, <b>provide copy of 1098-T- Needed for tuition credit</b> -Only if you are claiming yourself	
Unemployment Income statements 1099-G	
1099-Gs from lottery winnings, if any	
Misc. income (1099-Misc)- Self Employed Income (1099-NEC)- Please include expenses, as you will be filing as a business.	
Capital Gain/Loss information on sales of investments & <b>CRYPTO</b> (Name of security, # of shares, purchase date**, selling date**, original cost**, and selling price) <b>Form 1099-B</b> <i>**must have these items</i>	
Teachers and Teacher Aids- Amount spent on classroom supplies (up to \$300 per taxpayer)	\$
Total rent paid in Massachusetts (Jan-Dec 2025)	\$
Charitable donations by cash, check or credit. <b>Mass state is now allowing all monetary donations, even if filing the short form on the federal taxes.</b>	\$

**Note: If you started a business or purchased rental property in 2025, please let me know so I can let you know what additional documentation you will need to include with your tax documents.**