

Tax Preparation Checklist 2025

Name(s): _____ Phone(s): _____/_____

E-mail(s): _____/_____

(New clients only) DOB(s)/(spouse) _____/_____

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 address**

Name of Bank	Account #
Routing #	Checking <input type="checkbox"/> or Savings <input type="checkbox"/>

Proof of Health Care Form (form MA 1099-HC) **Everyone must have this form if over age 18 unless on Medicare	<input type="checkbox"/>
Form 1095-A Health Insurance Market Place Statement (if you get your health insurance from the marketplace)	<input type="checkbox"/>
All W2s-Only one copy is needed. Please only provide me with one copy	<input type="checkbox"/>
All 1099-int/divs for interest income and dividend income	<input type="checkbox"/>
Pension and IRA distributions 1099-R (401K withdrawals)-I only need ONE COPY	<input type="checkbox"/>
Unemployment Income statements 1099-G or 1099-Gs from lottery winnings (if any)	<input type="checkbox"/>
Misc. income (1099-misc)- Self Employed Income (1099-NEC). If you receive a 1099-NEC, you will be showing a business form on your taxes. Please include expenses.	<input type="checkbox"/>
Student Loan Interest Paid statements (1098-E)	<input type="checkbox"/>
Continuing Education Expenses, provide copy of 1098-T- Needed for tuition credit	<input type="checkbox"/>
Real Estate Taxes paid (should be on your 1098 Mortgage int. stmt.) **Even if you are claiming the standard deduction and are over age 65. You may qualify for the Senior Circuit Breaker Credit \$_____	<input type="checkbox"/>
Capital Gain/Loss information on sales of investments & CRYPTO (Name of security, # of shares, purchase date**, selling date**, original cost**, and selling price) Form 1099-B **must have these items	<input type="checkbox"/>
Mortgage Interest Paid (Note – if you refinanced or your mortgage was sold be sure to include all mortgage interest statements) Please include your mortgage statement(s)	\$ _____
Excise tax on vehicles (Amt. paid- Receipts not needed) Only if Long form	\$ _____
Child care expenses –Be Please include name, address, Tax ID, amount paid, as well as the name of the child(ren) with the amount paid for each child. (use a separate paper)	\$ _____
EZ pass or Commuter Pass expenses up to \$1,000 (taxpayer & spouse)	\$ _____
Total amount of Rent Paid ** Amount only-Receipts not needed** (Jan-Dec 2025)	\$ _____
Classroom supplies for teachers who buy their own supplies (\$300 max each)	\$ _____
Charitable Donation – cash, check or credit (Amount donated- Receipts NOT needed)- Fully deductible on Mass State Taxes as of 2023- even if filing short form on the federal	\$ _____
Charitable Donation - non cash (clothing, household items, toys, etc.) **For any and all single donations over \$500.00, please provide receipts. Otherwise, receipts not needed	\$ _____