Personal Tax Preparation Checklist

To ensure accurate tracking and timely processing, please use our secure link.

SECURE FILE UPLOAD

Personal Information for NEW CLIENTS OR CHANGES:

- [ ] Taxpayers' full legal name, date of birth and social security number.
- [ ] Taxpayers' cell or home telephone number and email address.
- [ ] Dependent(s) full legal name, date of birth, social security number, & months resided with taxpayer.
- [ ] Form 8332 executed by custodial parent, if applicable.
- [ ] Home address and county of residence as of January 1, 2025.
- [ ] Copy of taxpayers' driver's license.

Incomes:

- [ ] W-2s for each employer, *including* W-2s from businesses that you own.
- [ ] W-2G for gambling winnings and/or a detailed record of losses.
- [ ] 1099s for all income reported to the IRS: Dividend income (1099-DIV), Interest income (1099-INT), Miscellaneous income (1099-MISC), Retirement (1099-R), sale of home or real estate (1099-S), Unemployment compensation or State Tax Refund (1099-G).
- [ ] Rental income.

Deductions:

- [ ] 1098-S Mortgage Interest.
- [ ] Real estate taxes on personal residence even if you don't itemize.
- [ ] 1098-T Education Expenses: scholarships, itemized receipts of qualified educational expenses.
- [ ] Child & Dependent Care Expenses: name, address, Tax ID or Social Security Number of the childcare provider and amount paid per child.
- [ ] Charitable Contributions: detailed list of donations, contribution date, receipts & value of the donation.
- [ ] Did you purchase an electric/hybrid vehicle. Need year, make and model.
- [ ] Vehicle excise and sales tax paid (may be deductible if you itemize).
- [ ] Medical expenses: insurance premiums, doctor, dentist, eye care, and prescriptions if they are substantial.
- [ ] Health Savings Account (HSA) contributions (Form 5498-SA) and distributions (Form 1099-SA).
- [ ] Personal rent paid in 2025, include # of months and monthly rent, name & address of Landlord
- [ ] Rental (if you own rental real estate) expenses detailed per category.
- [ ] Contribution to a 529 College Savings Plan. Withdrawn funds from 529 Plans, Form 1099-Q needed.
- [ ] Student loan interest, Form 1098-E.

Other:

- [ ] Bank account and routing numbers for direct deposit of your potential refund.
- [ ] Estimated Tax Payments – include amount paid, date you made the payment and for which quarter. If you have a copy of the check or receipt if paid online, include a copy.

Although our office provides estimated payment vouchers, we must verify that the payments were made as prepared, since some clients do not submit payments or remit the full amounts.

- [ ] Number of children in private grade school or high school.
- [ ] SOLD HOUSE: Settlement statement for the sale of real estate. If you received a 1099-S, need for tax return. Also need ALTA settlement statement when you purchased the property and may need renovation cost if the gain on the house is greater than $250,000 single or $500,000 married.
- [ ] Last year's tax return, if not prepared by us.
- [ ] Health insurance through healthcare.gov marketplace we need form 1095-A if you received a reduction in your premium payment.
- [ ] Foreign Accounts: Do you have any foreign accounts?
- [ ] Virtual Currency: In 2025, did you receive, sell, send, exchange or acquire any financial interest in any virtual currency?
- [ ] Long-Term Healthcare: If you have long-term healthcare, we need to the amount that was paid and name of provider.
- [ ] Active Military or National Guard? If you have any compensation for military service, please identify that compensation.

TAX NOTICE STATEMENT: Please note that providing incomplete or inaccurate information may result in delays in processing your return and could lead to tax notice(s). Any tax notice arising from an error or omission by our team will be addressed promptly at no cost to you. Responses to all other notices fall outside the scope of our original engagement and are subject to our standard hourly rates.

❖ PERSONAL TAX QUESTIONNAIRE FOR 2025 TAXES ❖

Please complete this form and include with your tax material.

YOUR NAME		SPOUSE NAME	
PHONE		PHONE	
EMAIL		EMAIL	
ADDRESS *(if new)*			
CITY/STATE/ZIP			

❖ TAX RETURN QUESTIONS ❖

HAS YOUR MARITAL STATUS CHANGED	☐ Yes ☐ No	
HAS YOUR FILING STATUS CHANGED	☐ Yes ☐ No	
DO YOU/SPOUSE HAVE AN IRS PIN #	☐ Yes ☐ No	My Pin: Spouse Pin:
HEALTH INSURANCE: DO YOU HAVE HEALTHCARE.GOV	☐ Yes ☐ No	*Will need Form 1095-A*
DID YOU BUY AN ELECTRIC VEHICLE/HYBRID IN 2025	☐ Yes ☐ No	***Will need a copy of the Clean Vehicle Seller Report to determine if you qualify.*** This is obtained from the dealership. If you don't have, contact dealership. If we do not have this report, it will not be applied.
DO YOU HAVE FOREIGN ACCOUNTS	☐ Yes ☐ No	
DO YOU HAVE VIRTUAL CURRENCY/DIGITAL ASSETS	☐ Yes ☐ No	Did you use it to sell any currency, buy anything, *if so, need receipts*. Did you receive (as a reward, award or payment) or sell, exchange, gift, or otherwise dispose of a digital asset?
ARE YOU/SPOUSE CURRENTLY SERVING IN THE ACTIVE MILITARY OR NATIONAL GUARD	☐ Yes ☐ No	
DO YOU/SPOUSE HAVE LONG-TERM HEALTHCARE	☐ Yes ☐ No	Provide amount paid and name of provider with your tax materials

❖ IF GETTING A REFUND ❖

The IRS announced paper refund checks are being phased out. Should you choose a paper check, it can take up to 6 weeks for delivery. ***Click Here***

☐ Rollover to 2026 Taxes ☐ Paper Check ☐ Direct Deposit: Bank Account # ________________________ Routing # ________________________

❖ DID YOU PAY RENT IN 2025 ❖

IF YES, IS THE LANDLORD SAME AS LAST YEAR? ☐ Yes ☐ No

Monthly Amount: $ Name of Landlord: *(if new)*

Landlord Address: *(if new)*

City/State/Zip:

❖ DEPENDENTS CLAIMING ON YOUR TAXES ❖

DO YOU HAVE DEPENDENT(S) CLAIMING ON YOUR TAXES? ☐ Yes ☐ No

Are your dependent(s) filing their own taxes? ☐ Yes ☐ No

Are your dependents the same as last year? ☐ Yes ☐ No

Do not have your dependents claim themselves on their taxes if you want to claim on your taxes.

*Complete **ONLY** if not on last year's taxes prepared by our firm*

Child's Legal Name	Date of Birth	SSN

DID YOU PAY FOR PRIVATE SCHOOL/HOME SCHOOL IN 2025	☐ Yes ☐ No	# of children:
DID YOU OR A DEPENDENT PAY TUITION/FEES FOR COLLEGE	☐ Yes ☐ No	Will need Form 1098-T. You will have to go online to the college and download, it may not be mailed.
DID YOU INVEST IN 529 PLAN	☐ Yes ☐ No	Will need year end form
DID YOU PULL MONEY FROM 529 PLAN	☐ Yes ☐ No	Will need Form 1099-Q

❖ ESTIMATED TAX PAYMENTS ❖

DID YOU PAY ESTIMATED TAX PAYMENTS?

FEDERAL: ☐ Yes ☐ No
STATE: ☐ Yes ☐ No

For the 2025 tax return, we will need either a copy of the check or complete the table below.
We do not need the amount paid with the 2024 tax return or the Q4 2024 estimated tax payment that was due on 1/15/2025. See the payment dates below for the 2025 tax year.

TO VERIFY AMOUNTS PAID, PLEASE LOG INTO YOR ACCOUNT OR CREATE AN ACCOUNT WITH THE IRS OR THE IN DEPARTMENT OF REVENUE.

Estimated Payments	Federal		Indiana *Also list other state(s)*	
Qtr / Due Date	Amount Paid	Date Paid	Amount Paid	Date Paid
1ST 4/15/2025				
2ND 6/16/2025				
3RD 9/15/2025				
4TH 1/15/2026				

TAX NOTICE STATEMENT: Please note that providing incomplete or inaccurate information may result in delays in processing your return and could lead to tax notice(s). Any tax notice arising from an error or omission by our team will be addressed promptly at no cost to you. Responses to all other notices fall outside the scope of our original engagement and are subject to our standard hourly rates.

Completed by: ______________________________ Date: ______________________________