

Tax Prep Documents Checklist for 2025 Tax Returns

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Personal Information

____ Last year's tax return, if you are a new client.

____ Name, address, SSN and DOB for yourself, spouse, and dependents, if not on file with us.

____ If you moved, when?

____ Banking Information, if Direct Deposit

____ Refund/Payment AND different from last year.

____ Proof of Health Insurance, 1099-HC or 1095-A (Nothing Needed for Medicare)

____ Foreign Bank Accounts (Bank Name & Address)

____ Identity Protection Pin Letter (If Obtained)

Income Data (where applicable)

____ Wages, salaries, tips, etc. (W-2)

____ Income of any dependents.

____ Interest and/or Dividend Income (1099-INT/DIV)

____ IRA, Pension & Annuity Distributions (1099-R)

____ Lump Sum Retirement Distr/Rollover (1099-R)

____ Social Security Benefit Statement (SSA-1099)

____ Home Sold/Bought (Settlement Stmt/1099-S)

____ Prior year installment sale info (Form 6252)

____ Stock or Bond Activity (1099-B)

____ Digital Currency/Assets Transactions

____ State/Local Refund/Credit/Offset (1099-G)

____ Alimony Received (& Agreement Date)

____ Other Income (1099-MISC)

____ Small Business Income (Schedule C) (1099-NEC)

____ Electronic Transactions (1099-K) (Venmo, PayPal)

____ Rental Property Income (Schedule E)

____ Farm Income (Schedule F)

____ Unemployment Compensation (1099-G)

____ Gambling/Lottery Wins & Losses/ Prizes (W-2G)

____ Cancellation of Debt (1099-C)

____ Foreign Income

____ Partnership/S-Corp/Trust Estate Income (K-1's)

____ All other income: Jury Duty, Barter, etc...

Expense Data (where applicable)

____ Educator Expenses

____ HSA Contrib (5498-SA)/Distributions (1099-SA)

____ Self-employed Retirement Plan Solutions

____ Self-employed Health Insurance costs

____ Alimony Paid (Recipient's SSN & Agreement Dt)

____ Student Loan Interest (Form 1098-E)

____ Tuition Costs/Books & Supplies (1098-T)

____ Dependent Care Costs & Provider Name, Address, Tax ID/SSN if different from last year.

____ Adoption Expenses

____ Roth or Traditional IRA Contributions

____ Energy Efficient Home Improvements or Solar.

____ Electric Vehicle Purchase 1/1 – 9/30/2025

____ Est Tax Payments to Fed/State and Dates Paid

(Schedule A Deductible Expenses for Itemizing)

____ Medical/Dental Expenses

____ State/Local Income Taxes or General Sales Taxes

____ Real Estate Taxes

____ MA Vehicle Excise Tax or NH Local Municipal

____ Portion of Vehicle Registration Fee

____ Paid Sales Tax on large purchase: vehicle/boat

____ Mortgage/Home Equity Loan Interest (1098)

____ Qualified Vehicle Loan Interest

____ Charitable Contributions Cash/Non-Cash

____ Casualty losses from federally declared disaster.

Expense Data (unique to Massachusetts)

____ Fidelity 529 College Savings Plan Contributions

____ MA rent paid with Name & Address of Landlord

____ Septic & Lead Paint Compliance Expenses

____ MA Commuter Rail and/or Fast Pass Tolls

____ If over 65 year of age, MA Primary Residence