



# CHECKLIST

## For 2025 Taxes

(Prepared in 2026)

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### NEW CLIENTS ONLY

- |   |   |
|---|---|
| <input type="checkbox"/> Copy of Social Security Card                 | <input type="checkbox"/> Birth Dates for Every Person on the Return                     |
| <input type="checkbox"/> Spouse's Social Security Card                | <input type="checkbox"/> Copy of Last Year's Tax Return Including all States and Cities |
| <input type="checkbox"/> Name & Social Security Numbers of Dependents | <input type="checkbox"/> School District you Live In                                    |

### INCOME

- |   |  |
|---|--|
| <input type="checkbox"/> W-2 Forms from your Employer(s)                            | <input type="checkbox"/> Any Other 1099 Forms (1099-S, 1099-MISC, 1099-G, etc.)        |
| <input type="checkbox"/> Final Paystub from 2025 (If you earned overtime income)    | <input type="checkbox"/> Credit Card or Payment App Money Received (1099-K or not)     |
| <input type="checkbox"/> Self-Employment (Include all income & expenses)            | <input type="checkbox"/> Cancellation of Debt (Form 1099-C)                            |
| <input type="checkbox"/> Contractor/Subcontractor Income (Form 1099-NEC or not)     | <input type="checkbox"/> Rental Income and Expenses                                    |
| <input type="checkbox"/> Interest from your Bank/Credit Union, etc. (Form 1099-INT) | <input type="checkbox"/> Gambling or Lottery Winnings and Losses (W-2G or not)         |
| <input type="checkbox"/> Dividend Income (Form 1099-DIV)                            | <input type="checkbox"/> Cryptocurrency Transactions (1099-DA or not)                  |
| <input type="checkbox"/> Stock Sales Broker Statement and Cost Basis (Form 1099-B)  | <input type="checkbox"/> Sale of Any Assets  |
| <input type="checkbox"/> Social Security/Railroad Retirement (SSA-1099/RRB-1099)    | <input type="checkbox"/> Prizes and Awards   |
| <input type="checkbox"/> Pension/Retirement Income (Form 1099-R)                    | <input type="checkbox"/> Hobby Income  |
| <input type="checkbox"/> Income from Partnerships, S-Corps, Trusts (Schedule K-1)   | <input type="checkbox"/> Alimony Received (For divorces finalized before Jan. 1, 2019) |

### DEDUCTIONS

- |  |   |
|--|---|
| <input type="checkbox"/> Medical & Dental (If exceeding 7.5% of income)    | <input type="checkbox"/> Interest Paid on a New Vehicle Purchased in 2025<br>(U.S. final assembly only) |
| <input type="checkbox"/> Property Taxes PAID in 2025 (Also see MI section) | <input type="checkbox"/> Cash & Non-Cash Charitable Donations (Must have receipts)                      |
| <input type="checkbox"/> License Tab Fees on Automobiles                   | <input type="checkbox"/> Miles Driven for Charity   |
| <input type="checkbox"/> Major Purchases that you Paid Sales Tax on        | <input type="checkbox"/> Casualty Losses (If in a disaster area)  |
| <input type="checkbox"/> Mortgage Interest/Points/PMI (Form 1098)          |   |

### ADJUSTMENTS & CREDITS

- |   |   |
|---|---|
| <input type="checkbox"/> Health Savings Account (Form 1099-SA)  | <input type="checkbox"/> Student Loan Interest Paid (Form 1098-E)   |
| <input type="checkbox"/> Traditional IRA Contributions/Roth Contributions (Form 5498 or not)  | <input type="checkbox"/> Amount Paid to Educational Institution<br>(Form 1098-T and financial account transcript) |
| <input type="checkbox"/> Any Changes in Dependents (Added or removed)   | <input type="checkbox"/> Educator Expenses (For teachers)   |
| <input type="checkbox"/> Child Care Provider Name/Address/SS#(or EIN) & Amount Paid   | <input type="checkbox"/> Receipts for Energy-Efficient Home Improvements  |
| <input type="checkbox"/> Adoption Expenses  | <input type="checkbox"/> Electric Vehicle Certificate<br>(Purchased on or before September 30, 2025)              |
| <input type="checkbox"/> Federal/State Estimated Taxes Paid (Include canceled checks,<br>bank statements, or electronic confirmation showing payment) |   |

### OTHER MISCELLANEOUS INFO

- |   |   |
|---|---|
| <input type="checkbox"/> Driver's Licenses (Taxpayer and spouse)                    | <input type="checkbox"/> Identity Protection PIN (IP-PIN if received)   |
| <input type="checkbox"/> Direct Deposit Info (Routing and account #s if applicable) | <input type="checkbox"/> If you Lived or Worked in a City with City Tax, How Many Days?                                 |
| <input type="checkbox"/> 1095-A Form (Marketplace/health insurance subsidy)         | <input type="checkbox"/> Form 8332 (For agreement proving your right<br>to claim a child who lived with your ex-spouse) |

### STATE OF MICHIGAN

- |  |   |
|--|---|
| <input type="checkbox"/> 2025 Taxable Value of Home  | <input type="checkbox"/> Medical Insurance Premiums Paid (If not pre-taxed) |
| <input type="checkbox"/> Property Taxes Billed in 2025 (Whether paid or not)   | <input type="checkbox"/> Child Support Received/SSI Received for Child(ren) |
| <input type="checkbox"/> Rent Paid and Number of Months Spent in Residence<br>(Include landlord's name & phone number) | <input type="checkbox"/> Contributions to a 529 Plan                        |

THIS LIST IS NOT ALL-INCLUSIVE. PLEASE ALSO INCLUDE ANY OTHER PAPERWORK YOU THINK MAY APPLY