

Below is a handy checklist of items that you may want to have ready for your tax preparer this year as you to file your 2025 tax return.

The Social Security / Tax ID numbers for all the people and dependents included on your tax return
Birthdates of yourself, spouse/significant other, and dependents included on your tax return
Correct spellings of all names for all the people included on your tax return (misspellings <i>will</i> delay any refunds)

*Even though your employer should report your income directly to the IRS, your tax preparer will also need the information on your W-2 form(s) and possibly several other documents necessary to complete your tax forms. Below is a list of some of those documents to have with you.*

TYPE of INCOME	IRS FORM
All employer earnings statements <u>including any Overtime and Tips.</u>	W-2
Corrected employer earning statements	W-2C
Gambling earnings	W-2G
Distributions from a pension, annuity, IRA, insurance contract and other retirement accounts	1099-R
Self-employment income	Form 1099 and Form 1099-MISC
Foreclosure of a home	Form 1099-A
Proceeds from broker transactions	Form 1099-B
Cancellation of debt	Form 1099-C
Dividends and distributions	Form 1099-DIV
Unemployment income or a state tax refund	Form 1099-G

Interest income	Form 1099-INT or Form 1099-OID
Business or rental income	Form 1099-K
Long Term Care reimbursements	Form 1099-LTC
Patronage dividends	Form 1099-PATR
Payments from qualified education programs	Form 1099-Q
Distributions from an ABLE account	Form 1099-QA
Proceeds from the sales of property	Form 1099-S
Health Savings Account and Medical Savings Account distributions	Form 1099-SA
Social Security benefits	Form SSA-1099
Railroad retirement benefits	Form RRB-1099

*Tax deductions can reduce your taxable income and, ultimately, your tax bill. Here are some forms you will need to document your major deductions:*

TYPE of DEDUCTION	IRS FORM
Mortgage Interest Statement	Form 1098
Donation of an automobile, or a boat or an aircraft worth more than \$500 to a tax- exempt organization	Form 1098-C
Interest you paid on a student loan	Form 1098-E
Tuition Statement	Form 1098-T
Record of estimated tax payments	Form 1040ES

If you are self-employed, many business expenses are also tax deductible. To document both personal and business expenses, make sure you have all your receipts, invoices, medical bills, and mileage logs.

It may also be a good idea to have a copy of your most recent tax return on hand if your tax preparer has not seen you before.

Your tax return will serve not only as a roadmap to your typical income and deductions, but also point out any major changes that may have occurred in the last year and any possible discrepancies between your returns.