

## 2025 Income Tax Document Checklist

Please provide us with the following documentation/information during your tax appointment or include them if mailing to the office.

The existence of any/all documents will depend on your particular tax situation.

**\*NEW\***

**Any cryptocurrency transactions**

<b>FORM</b>	<b>(X)</b>	<b>DESCRIPTION</b>
<b>W-2's</b>	_____	From all employers and copy of your last pay stub
<b>W-2G</b>	_____	Gambling winnings
<b>1099-INT</b>	_____	Interest income from banks, insurance companies, & financial institutions
<b>1099-DIV</b>	_____	Dividend income from banks, corporations, and financial institutions
<b>1099-B</b>	_____	Stock sales & hedging gains/losses
<b>1099-C</b>	_____	Debt Cancellation
<b>1099-K</b>	_____	Payment Card and Third Party Network Transactions
<b>1098-E</b>	_____	Interest paid on college loans
<b>1099-G</b>	_____	State tax refunds, unemployment, USDA, and other government payments
<b>1099-MISC/NEC</b>	_____	Rent received, custom work, **crop insurance proceeds, prizes
<b>1099-PATR</b>	_____	Patronage Dividends
<b>1099-R</b>	_____	IRA, Roth, pension and annuity distributions
<b>1099-S</b>	_____	Proceeds from Real Estate Transactions
<b>1099-SSA</b>	_____	Social Security benefit statements
<b>1098-T</b>	_____	College tuition statements
<b>1098</b>	_____	Mortgage interest on a house, farmland or other property
<b>K-1 Schedules</b>	_____	Partnerships, S-Corporations, LLC's, Estates and Trusts
<b>1095-A</b>	_____	Health insurance premium information provided by marketplace/exchange
<b>1099-SA</b>	_____	HSA Distributions
<b>Other:</b>	_____	<b>Real Estate Tax Statements for taxes paid</b>
	_____	Closing Statement on Sale of Personal Residence
	_____	Sales Tax paid on purchases of Autos, Boats, Planes & Motorcycles
	_____	Contributions to SEP, IRA, SIMPLE Plans, and HSA's
	_____	Birth date & Social Security card for any new dependents for year
	_____	Daycare providers name, address, social security number and amount paid
	_____	Dated invoices of all major purchases or sales (equipment & investments)
	_____	Bill of Sale for assets purchased
	_____	Interest Paid on New Vehicle assembled in US
	_____	
		<b>E-mail addresses for communication purposes</b>
		<b>Cell phone number</b>

**\*\* Please bring in ALL documents pertaining to crop insurance proceeds**

**NOTE:** We have worksheets in our office & published on our website to help you prepare for your upcoming appointment. Some of these include Farm, Self-Employed Business Operations, Itemized Deductions, Rental Income & Expenses, and Daycare & Home Office worksheets.