

## 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)    DESCRIPTION</b>
W-2's	From all employers and copy of your last pay stub
W-2G	Gambling winnings
1099-INT	Interest income from banks, insurance companies, & financial institutions
1099-DIV	Dividend income from banks, corporations, and financial institutions
1099-B	Stock sales & hedging gains/losses
1099-C	Debt Cancellation
1099-K	Payment Card and Third Party Network Transactions
1098-E	Interest paid on college loans
1099-G	State tax refunds, unemployment, USDA, and other government payments
1099-MISC/NEC	Rent received, custom work, **crop insurance proceeds, prizes
1099-PATR	Patronage Dividends
1099-R	IRA, Roth, pension and annuity distributions
1099-S	Proceeds from Real Estate Transactions
1099-SSA	Social Security benefit statements
1098-T	College tuition statements
1098	Mortgage interest on a house, farmland or other property
K-1 Schedules	Partnerships, S-Corporations, LLC's, Estates and Trusts
1095-A	Health insurance premium information provided by marketplace/exchange
1099-SA	HSA Distributions
Other:	<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

**E-mail addresses for communication purposes**

**Cell phone number**

\*\* 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.