

BELOW IS A PARTIAL LIST OF THE COMMON INFORMATION AND DOCUMENTS NECESSARY TO PREPARE A FEDERAL INCOME TAX RETURN. MANY OF THE DEDUCTIONS LISTED ARE SUBJECT TO LIMITATIONS AND PHASE OUTS BASED ON INCOME OR OTHER FACTORS.

**2025 (NEW FOR 2025 IS IN BOLD PRINT)**

- W-2 FROM ALL EMPLOYERS.** BRING LAST PAYSTUB FOR EACH EMPLOYER FROM 2025 AND TIP INCOME NOT ON W-2.
- OVERTIME:** BRING THE LAST PAYSTUB YOU RECEIVED FOR 2025, as this is the only way to calculate the deduction if not on W2.
- CAR LOAN INTEREST MAY BE DEDUCTIBLE, MUST BE A NEW VEHICLE WITH LOAN AFTER 12/31/2024.**
- W-2G FOR ALL GAMBLING WINS.** GET WIN/LOSS STATEMENTS FROM CASINO(S). Gambling Logs very important, Keep one!
- 1099-INT, 1099-DIV:** SHOWING INTEREST AND DIVIDEND INCOME.
- 1099-R** FOR ANY RETIREMENT MONEY RECEIVED.
- 1099-SSA** FOR SOCIAL SECURITY BENEFITS RECEIVED (RED & WHITE FORM). NOT THE LOOK-ALIKE ONE SHOWING 2026 BENEFIT
- 1099-G** FOR ANY STATE UNEMPLOYMENT BENEFITS YOU RECEIVED.
- 1099-G** FOR ANY OTHER STATE INCOME TAX REFUNDS.
- 1099-B** FROM INVESTMENT COMPANIES/BROKERAGES FOR SALE OF STOCKS. (Fidelity, Vanguard, etc.)
- 1099-MISC & ANY OTHER INCOME.**
- IF ITEMIZING MUST HAVE WRITTEN ACKNOWLEDGEMENT BEFORE FILING IF \$250 OR MORE IN NON-CASH CONTRIBUTIONS.**
- 1099-C/1099-A** FOR CANCELLATION OF DEBT INCOME. It is overlooked income that we may be able to make go away legally.
- K-1** FROM PARTNERSHIPS, S-CORPS OR TRUSTS.
- BUSINESS INCOME AS A SOLE PROPRIETOR-SUMMARIZE EXPENSES BY CATEGORY AND TOTAL MILEAGE (1099-NEC)** Bring P&L.
- RENTAL INCOME AND EXPENSES BY PROPERTY AND CATEGORY, LIST MAJOR PURCHASES WITH DATE & AMOUNTS PAID.**
- ALIMONY RECEIVED OR PAID FROM PRE-2019 DIVORCE.**
- RECEIVE, SEND, EXCHANGE, OR SALE OF VIRTUAL CURRENCY IN 2025 (E.G. BITCOIN).**
- MEDICAL EXPENSES (IF GREATER THAN 7.5% OF YOUR INCOME IF YOU ARE ITEMIZING).**
- SALES TAX ON NEW AUTO PURCHASE. BRING SALES Invoice/LEASE PAYMENTS.**
- OTHER TAXES PAID, DMV TAXES PAID ON VEHICLE REGISTRATIONS, ETC. BRING ALL LICENSE PLATE NUMBERS.**
- REAL ESTATE TAXES PAID FOR ALL PROPERTIES.**
- 1098-MORTGAGE/HELOC INTEREST ON ALL REAL ESTATE PROPERTIES, MARGIN ACCTS, ALL OTHER INVESTMENTS.**
- FORM 1095-A (REQUIRED) FROM HEALTH EXCHANGE IF YOU HAVE ACA (OBAMA CARE). CALL NV HEALTH EXCHANGE.**
- STUDENT LOAN INTEREST PAID IN 2025 (1098-E). KIDS IN COLLEGE? GET 1098-T FROM STUDENT ACCOUNT.**
- CHILD CARE COSTS. REQUIRES AMOUNT PAID WITH PROVIDERS NAME, ADDRESS AND TAX ID.**
- MANUFACTURER CERTIFICATE FOR QUALIFYING HOME ENERGY OR ELECTRIC CAR CREDITS.**
- IRA CONTRIBUTIONS, ROTH & Traditional (CAN CONTRIBUTE UP TO APRIL 15<sup>TH</sup> for 2025).**
- ESTIMATED TAX PAYMENTS-FEDERAL AND STATE- DATES AND AMOUNTS PAID (Cause of most IRS letters, Photocopy checks)**
- SETTLEMENT OR DISCLOSURE STATEMENT FROM TITLE COMPANY FOR ANY REAL ESTATE SALES, PURCHASES OR REFINANCING.**
- PROVIDE FOREIGN FINANCIAL ACCOUNT DETAILS IF \$10,000 OR MORE WAS HELD IN FOREIGN ACCOUNTS AT ANY TIME IN 2025.**
- BRING SOCIAL SECURITY CARDS FOR ALL DEPENDENTS IF NOT GIVEN PREVIOUSLY. \*\*\*Trump ACCTS If child born in 2025\*\*\***
- PROVIDE A COPY OF A CHECK IF DIRECT DEPOSIT OF REFUND OR DIRECT DEBIT OF BALANCE DUE IS REQUESTED.**
- PAYMENTS FOR SERVICES For A RENTAL/BUSINESS TOTALING \$600 OR MORE REQUIRE A 1099 BE ISSUED BY 1/31/2026.**
- EMPLOYERS WITH FIVE OR MORE W-2 EMPLOYEES ARE REQUIRED TO OFFER A RETIREMENT PLAN (NEW FOR 2025).**

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For better identity protection get an annual IP PIN at [www.irs.gov](http://www.irs.gov). Search "Get an IP PIN". Bring your current IP PIN your appointment.

**WE WILL TAKE RESPONSIBILITY FOR FILING AN EXTENSION OF TIME TO PREPARE YOUR INCOME TAX IF YOU CONTACT US TO REQUEST AN EXTENSION.**

It is a taxpayer's responsibility to maintain organized documentation of the income and deductions claimed on a tax return. Documentation includes but is not limited to records on income received, receipts and proof of payment for deductions indicating purpose, mileage logs, gambling logs, and a general ledger for business income and deductions. We cannot share your information with a third party unless you provide written consent in accordance with federal law.

Secure Portal is **Verifyle** to send & receive documents.