

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 W-2**
- ☐ **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).

TEL: 702.259.1040

EMAIL: [TAXOFF@AOL.COM](mailto:TAXOFF@AOL.COM) & **Zelle for Payments**

**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.