Royale Advisors 2025 Tax Prep Checklist

Get ready for tax season like royalty. Use this elegant, minimal checklist to make sure your documents are prepared before filing begins on January 2, 2026.

Personal Information

- Valid government-issued ID (for you and spouse, if applicable)
- Social Security cards for you, spouse, and all dependents
- Last year’s tax return (if available)
- Bank account information for direct deposit

Income Documents

- All W-2 forms from employers
- 1099-NEC or 1099-MISC for self-employment or side income
- 1099-G for unemployment income
- 1099-R for retirement or pension income
- SSA-1099 for Social Security benefits
- Brokerage statements (1099-B) or dividend income (1099-DIV)

Deductions & Credits

- Childcare expenses with provider details and tax ID
- Education expenses (Form 1098-T, tuition receipts)
- Mortgage interest (Form 1098) and property taxes
- Charitable donations with receipts
- Medical expenses and insurance premiums
- Retirement contributions (IRA, 401(k), etc.)

Business & Self-Employment

- Income and expense records (receipts, invoices, mileage log)
- Business bank statements
- Home office expenses (utilities, rent, or mortgage portion)
- 1099-K or gig income statements
- Any new business assets or equipment purchases

Optional Add-Ons

- Audit Protection enrollment (recommended)
- Refund Advance application (up to $7,000 available)
- File-Now-Pay-Later options

• Referral Bonus – Earn $100 per referral
• Royale Secure Upload Portal link for easy document transfer

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Luxury Tax & Financial Services for the Modern Royal.