Client Name:

2026 Universal Tax Record Checklist

PO Box 1279
Burnsville, MN 55337-0279
Tel (320) 629-4745
Fax (516) 941-0225
email todd@toddstaxservice.com
Cell (612) 242-5713 texts ok.

	Do you have?
	Roth IRA
	529 Plan Educa
	401K or other retire plan
	HSA
	U.S. Savings Bonds

Please review this checklist to make sure we don't miss anything!

__Confirm you filed your 2025 tax return through Todd (no new clients)
___W-2 Forms.
___1099 Forms. (These could be 1099-R, 1099-MISC, 1099-S, 1099-Int)
___Certificate of Rent Paid if you rent your home.
___Do you or your spouse have an IPIN? (IRS issued ID Theft Pin #)

	YES	NO
Has your marital status changed since 12/31/2025?		
Are there **new dependents** in your household since 12/31/25?*		
Have you received any correspondence re your 2025 taxes?		
Do you need advice on any special issues now or in 2027?		
Do you have a bank (checking or savings account)?		
Did you sell a home in 2026?		
Are you still waiting for certain tax documents to come?		
Have you filed for bankruptcy or had debt cancelled in 2026?		
Do you have health insurance?		
Did you receive any nontaxable income?		

___MFIP ___Work Comp _____Other < Check all that apply.

* Bring a social security card and birth certificate for any NEW dependents on your return.
New clients should bring both (SS card and birth Cert) for all children on the EIC form)

Contact Info :

Taxpayer:	DOB	SSN
Spouse:	DOB	SSN

Address: _____

_____

Home Telephone: _____

Cell Phone: (Text Y or N) _____

Email taxpayer: _____

Email spouse: _____

New Dependents:

Name	SSN	DOB

State Income Tax -Did you live or work in another state other than your home state? Y___ N____

Dates of Residence:	ST # 1		ST #2	
Spouse Date if diff:	ST # 1		ST #2	

Delivery Preference: Online ___ US Mail ___

INCOME CHECKLIST

		IRS Form
	Wages	W-2
	Unemployment	1099-G
	Interest	1099-INT
	Gambling	W-2G
	Self Employment	1099-MISC
	IRA/ 401K Distribution	1099-R
	Pension	1099-R
	Social Security	1099-SA
	Investment Act	1099
	Crypto Account	1099
	"Gig" Economy	1099
	Sale of Real Estate	1099
	K-1 Estate, Trust, S Corp, Partr	
	Rental Income	
	Other - please specify:	
	Foreign Accounts?	
	Open IRS Issues?	
	HSA Distribution (Form 1099SA)	
	Form 1095-A from Health Exchange	
	Forms 1095 -A,B or C (Health)	

Date of initial client submission of info to Todd:___-___-___

Daycare Info:

Name of Provider:_____

Address of Provider:_____

Fed Tax ID of Provider:___-_____

Amount Paid:_____ Care for: _____/_____

Tuition Information:

We need 1098-T AND cancelled checks!

Name of College Student:_____

Name of College_____

Out of Pocket Costs - list:		
Tuition and Fees		
Books (Required)		
Grants / Scholarships?		

Name of College Student:_____

Name of College_____

Out of Pocket Costs - list:		
Tuition and Fees		
Books (Required)		
Grants / Scholarships?		

Mileage:	Car #1	Car #2
Description of Vehicle:		
Gross (Total) Mileage for YR		
Commuting Miles (not ded)		
Work related miles not DEDUCTIBLE		
Charity Miles		
Medical Miles		

You must have written records (log) to take a deduction.

Mileage to and from home and work is not deductible.

	2026	2025
Mileage Rates		
Business Use	72.5¢	70¢
Medical	20.5¢	21¢
Charitable	14¢	14¢
Moving	20.5¢	21¢

Deductions/ Credits Detail

I have received a copy of this checklist:

Taxpayer Initials___ Spouse Initials___ Date:

DEDUCTION /CREDIT CHECKLIST

Medical Bills	
Mortgage Interest	
Property Taxes	
Contributions	
Work Related Expenses	No longer deductible
Tuition	
Casualty/Theft Loss (Fire, Flood)	
Daycare expenses	
Student Loan Interest	
Auto Tax (Tabs)	
State:	
Minnesota K-12 School	
Wisconsin Rent/Prop Tax Paid	
WI Rent - Heat Paid? _____	
Long Term Care Ins Premiums Paid	
Health Ins Premium **if you pay out of your ckg act.**	

	Total Fee
Car # 1 Tabs (License Plates)	
Car # 2 Tabs (License Plates)	
Car #3 Tabs (License Plates)	

The personal property tax is deductible and is the amount over $53.

Boat, Snow Mobile, RV, Trlr - NOT DED

State Balance Due Paid for 2025	
State Balance Due other years	

Interest on back taxes is not deductible.

Did you buy a new car, boat or RV?

Real Estate Tax Paid

Home	
Cabin/Second Home	
Land	

Penalties and late payment interest not deductible.

Car Loan Interest paid new car	

Sales Tax on new car or truck:

Use higher of income tax or sales tax.

Contributions:	
Cash - list	
Clothing - goods l	
Cannot exceed $500 without detail.	

Minnesota allows a subtraction for contributions over $500 even if you don't itemize your deductions on Federal.

Energy Credit: LAST YEAR (2025)

Retiree Tax Planning Questions:

	Y or N
Do you have a will? Updated:	
Do you have IRA accounts?	
Do you have more than $100,000 in IRAs?	
Do you have a ROTH IRA?	
Do you have Long Term Care Insurance?	
Do you own land?	
Have you filed a "Transfer on Death" Deed?	
Have you made gifts in excess of $19,000 per person?	
Do you have more than $10,000 in savings bonds?	

K-12 Expenses

Name:			
Grade:			
Supplies			
Music Lessons			
Musical Instrument			
Computer Purchase			
Tuition/Tutoring			
Transportation Paid			

Do not include:
internet fees, school lunches, clothing optional items.
You must have receipts for school items.

2026 Standard Deduction

Single	16,100	+65	2,050
Head of Household	24,150	+65	2,050
Married Filing Joint	32,200	+65	1,650
(Higher for 65+)		+65	

Office in home
Must use office area exclusiv for business. Ask for info.

Minnesota Non Game Wildlife Designation: YES____ NO____

US Presidential Election Fund YES___ NO___

Minnesota Political Party: R___ D_____ G_____ I_____

Please attach a voided check for direct deposit or direct debit.

Todd's Tax