

Client Name:

2025 Universal Tax Record Checklist

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

- Confirm you filed your 2024 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 12/31/2024?		
Are there new dependents in your household since 12/31/24?		
Have you received any correspondence re your 2024 taxes?		
Do you need advice on any special issues now or in 2026?		
Do you have a bank (checking or savings account)?		
Did you sell a home in 2025?		
Are you still waiting for certain tax documents to come?		
Have you filed for bankruptcy or had debt cancelled in 2025?		
Do you have health insurance?		
Did you receive any nontaxable income?		
M/FIP 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)

Taxpayer:	DOB	SSN
Spouse:	DOB	SSN

Address:

New Dependents:
Name SSN DOB

Home Telephone:

Cell Phone: (Text Y or N)

Email taxpayer:

Email spouse:

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

Dates of Residence:

Spouse Date if diff:

Delivery Preference:

Online US Mail

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

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, Partn	
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: ____ - ____ - ____

Deductions/Credits Detail

I have received a copy of this checklist:

Taxpayer Initials ____

Spouse Initials ____

Date: ____

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:

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.

	2024	2025
Mileage Rates		
Business Use	67¢	70¢
Medical	21¢	21¢
Charitable	14¢	14¢
Moving	21¢	21¢

DEDUCTION /CREDIT CHECKLIST

Medical Bills
Mortgage Interest
Property Taxes
Contributions

Work Related Expenses

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 2024	
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	
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Sales Tax on new car or truck: _____

Use higher of income tax or sales tax.

No longer deductible

Energy Credit: LAST YEAR (2025)

Home (Solar, Insulation, Heat/Furnace, Geothermal)
New or Used Electric Car Heatpump

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.

2025 Standard Deduction

Single	15,000	+65	2,000
Head of Household	22,500	+65	2,000
Married Filing Joint	30,000	+65	1,600
(Higher for 65+)			

Office in home
Must use office area exclusiv Minnesota Non Game Wildlife Designation: YES ___ NO ___
for business. Ask for info. 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