



Tax Filing Tips

- As W2's, 1099's, investment earnings and mortgage statements arrive, put them in a folder or secure area.
- Ask your child care provider for their tax identification number.
- Have your taxes prepared early; avoid last minute filing.
- Check your records for out of pocket medical and dental expenses. Don't forget mileage.
- Employer deferred 401K and 403B plan accounts are the best way to save on your taxes and build your retirement.
- You must have your dependent's social security number in order to claim them on your tax return.

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2025 Tax Organizer



 bpts@braceystax.com
 9604 Spinnaker Street | Suite 101
Cheltenham, MD 20623

2025 Tax Organizer

Income Items

- Wages
- Bonus/Commissions
- Cancellation of Debt Income
- State Tax Refunds
- Alimony
- Unemployment Compensation
- Social Security
- 1099 Income/Statements (All)
- Gambling - W2G
- 401K Withdrawals
- Pension Plans
- Profit Sharing

Interest | Dividend Income (please list)

Savings | CD | Money Market

Stock Sales (provide basis)

Taxes(\$40K cap)

- Real Estate
- State/Local Taxes
- Personal Property
- Other: _____

Interest Paid

- Automobile Interest
- Home Mortgage
- Home Equity/Line of Credit
- HUD-1 Settlement Statement
(Purchase or Refinance)
- Deductible Points
- Investment Interest
- Student Loan Interest

Child Care Expenses

(Must have the following information)

Name: _____
Address: _____
Tax ID#: _____

Other Itemized Deductions

- Gambling Losses
- Estate Taxes
- Ponzi Scheme Losses

Retirement Accounts

Fee(s): _____
Contribution(s): _____

Employee Business Expense
NO LONGER AVAILABLE
(with a few exceptions)

Contributions

Church: \$ _____
Charities: \$ _____
Other than cash: _____
Purple Heart: _____
Amvets: _____
Salvation Army: _____
Big Brothers | Big Sisters: _____
Goodwill: _____
Other 501(c3) Charities: _____

Volunteer Work Expenses: _____
Volunteer Mileage: _____

Medical | Dental Expenses

Expenses must exceed 7.5% of AGI. Pre-tax expenses are not deductible.

- Insurance Premiums
- Prescription Drugs
- Doctor | Dental
- Chiropractor
- Hospital
- Labs | Tests | X-Rays
- Therapy
- Transportation | Mileage