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BUSINESS CONSULTING

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2025 Tax Return Summary Checklist

Name:

SSN:

This checklist is provided to help gather information needed to prepare your 2025 income tax return.

Current Year Income Documentation

- Wage and tax statements (Form W-2)
- Gambling income (Form W-2G)
- IRA distributions, pensions, and annuities (Form 1099-R)
- Dividend income (Form 1099-DIV)
- Interest income (Form 1099-INT)
- Miscellaneous income (Form 1099-MISC)
- Nonemployee compensation (Form 1099-NEC)
- Unemployment compensation and government payments (Form 1099-G)
- Credit card / third-party payments (Form 1099-K)
- Social Security benefits (Form SSA-1099)
- Railroad retirement benefits (Form RRB-1099)
- Partnerships, S corporations, estates, and trusts (Schedule K-1)
- Brokerage transactions and capital asset sales (Form 1099-B)
- Real estate transactions (Form 1099-S)
- Business income (Schedule C)
- Rental income (Schedule E)
- Farm income (Schedule F / Form 4835)

Other Income

- Sale of assets or property
- Cancellation of debt
- Other income

Payments and Deductions

- Educator expenses
- Health Savings Account contributions
- Student loan interest
- Tuition and education expenses
- Child or dependent care expenses
- Retirement contributions
- Medical and dental expenses



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Real estate taxes
State and local taxes
Mortgage interest
Charitable contributions (cash and noncash)
Gambling losses
Other deductible payments