



Signature Tax & Bookkeeping LLC

Luis R. Herrera, EA.

2025 Tax Prep Checklist

For Personal Tax Returns

- ___ 1. W-2 forms from employers
- ___ 2. 1099 forms for other income (e.g., freelance work, investments, unemployment, interest income, gambling wins/losses)
- ___ 3. Records of other income (e.g., rental income, alimony received)
- ___ 4. Social Security benefits statement (SSA-1099)

Deductions and Credits

- ___ 1. Receipts for deductible expenses:
 - Medical and dental expenses
 - Charitable contributions
 - Education expenses (Form 1098-T)
 - Home mortgage interest (Form 1098)
- ___ 2. Childcare expenses and provider information

Other Documents

- ___ 1. Last year's tax return (if available)
- ___ 2. Tax payment receipts (if you made estimated tax payments)

For Business Tax Returns

Business Information:

1. Employer Identification Number (EIN) or SSN
2. Business income and expense records
3. Copies of business licenses or permits (if applicable)

Income Documents

1.
 - 1099-NEC and 1099-K forms
 - Bank statements
 - Records of cash transactions
 - Invoices and accounts receivable records
2. Financial Statements (if available)

Expense Records

1.
 - Rent or lease payments
 - Utility bills
 - Office supplies and equipment purchases
 - Employee payroll and benefits records
 - Vehicle mileage logs and fuel receipts (if applicable)
 - Advertising and marketing expenses
 - Insurance payments

Deductions and Credits

1.
 - Home office expenses
 - Depreciation schedules
 - List of capital assets (e.g., equipment, vehicles, real estate)
 - Professional service fees (e.g., legal, tax preparation)
 - Startup costs (if this is your first year in business)
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Other Documents

1.
 - Prior year's business tax return (if available)
 - Estimated tax payment receipts
 - Payroll Records

Need Help?

Organizing your taxes can feel overwhelming, but you don't have to go it alone. At Signature Tax & Bookkeeping, we specialize in making tax season stress-free.

Call or email us today to schedule a consultation:

702-969-5927

702-286-6158

Info@signaturetaxlasvegas.com

SignatureTaxLasVegas.com

Visit us at our office:

2980 S. Rainbow Blvd. Ste 100M Las Vegas, NV 89146