

What to bring to your preparer..2025TY

Please keep in mind, **not everything on this list will be needed** by every individual.

It is meant to **serve as a helpful reminder** of general guidelines.

General

- Driver's License ***required for BOTH spouses**
- Social Security Card(s) for NEW dependents only
- Last year's Federal AND State tax return (if not done at Griffin Accounting)
- IP-PIN ***required if you were assigned # from IRS**
- DIRECT DEPOSIT INFO

- Alimony paid OR received NEED SS# of payee (Divorce decrees prior to 12/31/2018)
- IRA Contribution
- 1095-A**; Insurance/Marketplace statement
- December/January Heating bill (for home heating credit*)
*for LOW income families

Income

Overtime and earned tips your final pay stubs will serve as primary record for calculating any new tax deductions. As your W-2 may not separate these qualifying amounts

- W-2 wage statements
- W-2G Lottery or Gambling winnings
- 1099-R Pension or retirement income
- 1099-INT/1099-DIV Interest and Dividend Income
- Commissions paid OR received
- Record of Purchase & Sale of Residence & dates

- 1099-G state refund amount
- SSA-1099 Social Security income
- 1099-G Unemployment income
- 1099-B Information on sales of Stocks or Bonds
- 1099-B Virtual Assets** Purchase/Sales/Gifts
- 1099-C Cancellation of Debt

Expenses

- Estimated taxes paid
- Foreign taxes paid
- 1098-E Student Loan Interest
- 1098-T Tuition expenses

- Proof of Education Expenses (books, lab fees)
- Child Care expenses and provider information
- Property Tax Statements

If itemizing (for Schedule A)

Updated Standard Deductions (Single \$15,750 / HoH - \$23,625 / MFJ - \$31,500) / Senior 65 & over +\$6,000 per Senior

- State and local sales taxes paid
- Lottery or Gambling losses
- Cash and noncash Charitable donations
- 1098 Mortgage/Home Equity loan Interest paid
- Real Estate and Personal Property taxes paid

- Casualty and Theft losses (FED DISASTER AREAS only)
- Medical, *Med*, & Dental (expenses over 7.5% of income)

For Businesses

- 1099-MISC/1099-K Self-employed business/Farm income & expenses
- Schedule K-1 Income from Partnerships, S-Corporations, Trusts, and Estates
- Business expenses (repairs, maintenance supplies, taxes/licenses)
- Home office expenses (utilities, repairs, internet, phone, etc., also need sq. ft. of Business Area)
- Income and Expenses from Rentals
- Business auto mileage (*70.0 cents per mile*)
- Business income
- Equipment purchased
- Job-related educational expenses
- Educator expenses
- RENTAL EXPENSES: taxes, mortgages, insurance and repairs



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