

Dear Client,

In preparation of the upcoming tax season please [click here](#) and download our income tax organizer to assist you in collecting information for your 2025 individual tax return.

Tax reporting forms will begin to arrive shortly, we want to remind you which ones we need you to accumulate and send to us with your tax information:

- W-2 for wages
- W-2G for gambling
- 1099-Int for interest
- 1099-DIV for dividends
- 1099-B Brokerage
- SSA-1099 Social Security
- 1099-NEC for income
- 1099-Misc for income
- 1099-K for income
- 1099-R for retirement
- 1099-G for refunds & unemployment
- 1099-Int for mortgages
- 1098-T for tuition
- 1099-SA for HSA's
- K-1 forms from investments in S corporations or partnerships
- Form 5498 for IRA values
- IRA and Roth IRA contributions for 2025
- Child care costs, and the name, address, amount and ID # of the recipient
- Charitable donations-total amounts and recipients
- Property tax paid on your home, property or cars
- Estimated tax payments and dates
- Employer statement for overtime and/or tips
- Any letters you received from the IRS or state tax authorities
- Our engagement letter

If you have a small business or rental property you can download a separate checklist from our website or [click here](#).

Again, crypto-currency activity continues to increase, and we need to report any crypto activity, please be sure to provide us with that information.

IRS scrutiny of foreign accounts means it is important you inform us of any non-US accounts or income.

If you installed a new furnace, A/C, boiler, heat pump, water heater, wood stove, windows, doors, insulation, solar or battery storage in 2025 please be sure to provide us with a copy of the invoice.

Similarly, if you bought a new electric or hybrid car prior to October 1, 2025 please be sure to provide the invoice and dealer paperwork as well.

Tax organizers for your individual return, as well as for businesses or rentals, can be found on our website srmisener.com.

Every year we are reminded of how much we value your business, and we want to once again say thank you. Please call us with any questions.

Sincerely,

Steven R. Misener