

City Center Tax Group

2025 Tax Appointment Checklist

	Description	✓
1.	Last year's tax returns (if not prepared by this office)	
2.	W-2 Forms	
3.	1099 Forms for interest and dividends, sale of stock/mutual funds	
4.	1099-R Forms for pension and IRA distributions	
5.	Small business income and expenses including 1099-NEC and 1099-K forms received	
6.	Rental property income and expenses	
7.	Statement of IRA contributions made	
8.	Other Income: Alimony, gambling, hobby, cancellation of debt, unemployment	
9.	Foreign account statements (not reported on mutual fund or brokerage account)	
10.	Digital Asset account statements and Form 1099-DA	
11.	Childcare expenses	
12.	Real estate settlement statements from refinancing, purchase and/or sale	
13.	Itemized Deductions: - Medical expenses - Real estate taxes - Personal property taxes - Mortgage interest statements - Charitable contributions	
14.	Tuition Savings Plan (529 Plan) contributions and/or distributions Form 1099-Q	
15.	Student loan interest statement - Form 1098-E	
16.	College tuition and fees (Form 1098-T and tuition account printout), receipts for books and supplies	
17.	Estimated tax payment record (cancelled checks or bank records) for federal and state	
18.	Health Insurance form 1095-A, HSA contribution and/or distribution forms	
19.	Driver's licenses or other state ID for taxpayer and spouse	
20.	IRS and/or state correspondence received including IRS and state PIN numbers	

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