

Tax Prep List

All Income for 2025:

Most Recent and Previous Year W2's and/or 1099's

Copy of Previous Year Tax Return:

(800)829-1040 call IRS for a Transcript if you do not have a copy

Dependents:

Infants, Children who are schooling/non-schooling, working while in school, in/out of college working.... Full name(s), DOB & SS#'s

Daycare Information – Name & EIN#

College Students must have a 1098-E or T

Uniforms for Work

– that includes clothing and shoes/boots

Supplies/Equipment ex: Nurses buy stethoscopes, Mechanics buy tools...

-for work bought out of pocket and no reimbursement from the job...

Vehicle(s):

Year/Make/Model – sale cost \$ and tags/taxes & registrations

Date of Purchase and Monthly Payments and Interest Amt \$

Maintenance / Repairs / Oil Changes / Tune Ups / Tires, etc.,

Medical :

Insurance – 1095 A, B, C or any other insurance

Prescriptions – prescribed or over the counter

CoPays to Dr. offices, hospitals, labs, xrays, eye exams, dental visits

Homeowner(s):

1098 forms from your Mortgage Company

Businesses:

State Registration, EIN#, Income, Expenditures,

Investments, Lottery Winnings, 401k's, Retirement/Roth, Savings