

✅ **UPDATED CHECKLIST FOR THE 2025 TAX SEASON**

Here is a complete list of everything you need to gather to prepare your tax return, whether you work with a W-2 or are self-employed.

Basic Documents (For All Taxpayers):

- 1. Valid personal identification:**
 - Passport or photo ID (driver's license).
 - Social Security card or ITIN letters.
 - 2. Dependent information:**
 - SSN or ITIN for each dependent.
 - Birth certificate or evidence of relationship.
 - Form 8332 (if applicable).
 - School record.
 - Medical record for dependents under 6 years old.
 - 3. Proof of address:**
 - Utility bill, bank statement, or an updated official letter.
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If you are an employee with a W-2:

- 4. W-2 forms:**
 - Collect W-2 forms from all employers you worked for during the year.
 - Double-check that the information on your W-2 is correct.
 - Unemployment form 1099-G, Form 1095 (health insurance Marketplace).
 - Form 1098.
 - Personal property tax records.
 - Form 5498-SA showing HSA contributions.

If you are retired:

Forms 1099-R, SSA-1099, RRB-1099.

If you are self-employed:

- 5. Forms 1099-NEC, 1099-MISC, or 1099-K:**
 - Any forms received for services rendered, client payments, or payments from platforms.
 - Bank statement to verify deposits.
- 6. Income and expense records:**

- Sales or service invoices.
- Business expense receipts (fuel, advertising, software, vehicle taxes, sales tax, etc.).
- 7. **Business asset records:** (cost, date placed in service).
- 8. **Home office information.**
- 9. **Receipts for estimated tax payments:**
 - Proof of quarterly payments made to the IRS during 2024 (Form 1040-ES).

Common Deductions and Credits:

10. Proof of medical and insurance expenses:

- Bills for major medical expenses and proof of insurance payments.

11. Education-related expenses:

- Form 1098-T (if you paid tuition).
- Receipts for materials and books.

12. Proof of charitable contributions:

- Receipts for donations in cash or goods.

Important Extras:

- For any interest earned (Form 1099-INT).
- For investments, Form 1099-DIV, 1099-B.
- If you made home improvements, like solar panels, check for applicable credits for 2025.
- Last year's tax return.
- Proof of investments, pensions, businesses, or rental properties abroad.
- If you received or sold digital assets (cryptocurrencies, Bitcoin, Ethereum, etc.).

Important!

Gather these documents in advance to avoid delays. If you have any questions or need personalized help, feel free to reach out to us, and we'll be happy to assist you!

Ready to get started?

Schedule an appointment at www.taxamericaservices.com.