



Tax Return Checklist

Please provide the following information:

	A copy of your 2024 tax return
	Original Form(s) W-2
	Schedule(s) K-1 and K-3 showing income or loss from partnerships, S Corporations or estate and trusts
	Copies of other compensation or pension documentation such as Form 1099-MISC, 1099-NEC, Form 1099-R
	Form(s) 1099 reporting interest income, dividend income, and proceeds from stock sales
	Form(s) 1098 reporting home mortgage interest paid and copies of real estate taxes paid

Yes	No	Did you or your spouse:
		Work overtime in 2025? If so, please provide your paystub for the last pay date of 2025
		Renew your drivers' licenses last year?
		Bank account information change from last year?
		Marital status change in 2025?
		Become permanently and totally disabled in 2025?
		Have any changes to your dependents in 2025?
		Occupation change during 2025?
		Buy, sell or exchange any digital currency, such as Bitcoin?
		Receive any unemployment compensation in 2025?
		Have your health insurance through the marketplace for 2025?
		Withdraw from a 401k or IRA last year?
		Contribute to a retirement plan outside of your employer last year?
		Purchase a new car in 2025 that was assembled in the United States?
		Purchase an electric vehicle in 2025?
		Buy or sell a home in 2025?
		Buy or sell any assets or investments in 2025?
		Have a foreign bank account?
		Make any energy efficient improvements to your home or purchase any energy-saving property?
		Participate in a medical savings account like a health savings account in 2025?
		Pay interest on a student loan in 2025?