

## Tax Return Checklist

**Please provide the following information:**

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

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