2026 Tax Checklist (for tax year 2025)

Personal information (for you, your spouse, and dependents)	**Provided ✓**	**Yes**	**N/A**
SSNs or ITINs, full names and dates of birth, addresses, telephone numbers and email addresses			
Identity protection IP PIN(s) if issued by IRS (these are renewed in January for each tax season)			
Bank account and routing numbers if you would like us to set up direct debits or direct deposits			
Amount of alimony paid, ex-spouse's SSN and date of divorce agreement (for agreements before 2019)			
Childcare provider statement (including the provider's EIN, name, address, amount paid)			
Record of estimated tax payments: amounts and dates paid			
Copy of your 2024 tax return, and copies of your 2023 and 2022 returns if you wish to have them reviewed			
Any tax notices received from the IRS or other taxing authorities			
If you have a dependent born during 2025, do you want to establish a Trump Account?			
Income (investments, retirement, and business)			
All forms such as SSA-1099, W-2, W-2G, 1099, or Schedule K-1			
Record of qualified tips received (Form W-2, 4137 or a statement provided by your employer)			
Record of overtime payments received (the last pay stub of the year or a statement provided by your employer)			
Sale/purchase date and total investment in any stocks, cryptocurrency, or property you sold (Form 1099-B or DA)			
Closing documents for real estate sold - including sale AND purchase documents / list of improvements			
Amounts and dates of contributions that you made to IRAs and other retirement plans for the tax year			
Records of business income and expenses if you are an independent contractor, self-employed, or own rental real estate (if you received 1099-NEC, you are considered self-employed). See our checklists for the *Self-employed*, *Business use of home*, *Business use of vehicle*, and *Rental properties*. Your income and expenses should be totalled and categorized for the whole year.			
Education			
Education scholarships and fellowships, student loan interest paid (Form 1098-E), or educator expenses			
Records of tuition and other higher education expenses AND Form 1098-T for yourself and/or dependents			
Itemized deductions			
Please use our *Itemized deductions* checklist which explains when to itemize and covers healthcare expenses; mortgage interest, property tax, state/local income tax paid, charitable donations, gambling losses, etc.			
Other deductions and credits			
Hurricane losses: see our *Hurricane losses* checklist			
Loan interest for a new vehicle purchased in 2025 (provide loan agreement and vehicle docs including VIN)			
Energy efficiency improvements to your home (please use our *EEHIC checklist*)			
For electric vehicles purchased before September 30, 2025, bring IRS Form 15400 (Clean Vehicle Seller Report)			
Electric Vehicle Charger Credit: invoice showing installation address and amount paid			
Healthcare			
Form 1095-A if you enrolled in an insured plan through the Marketplace (Obamacare) **IMPORTANT!**			
HSA contributions (Form 5498) and distributions (Form 1099-SA)			
Disclosures			
At any time in the tax year, did you have more than $10,000 in foreign bank/investment/retirement accounts, or any financial interest in a foreign trust?			
Did you own and sell or exchange any virtual/crypto currency in 2025?			

Would you like a detailed tax organizer?

Returning clients: contact us if you would like a detailed tax organizer containing last year's information

New clients: a fillable detailed organizer can be found on the Resources page of our website

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