

2025 – Tax Document Check List
BE SURE TO PROVIDE THE FOLLOWING

- ___ 1. All copies of W – 2, W-2P, 1099, 1098, Property Tax Bills and K-1 Forms.
(Including tax-exempt interest reported on 1099).
- ___ 1A. Copies of final pay stub in 2025 showing overtime and tips received.
- ___ 2. All copies of Health Insurance Coverage Verification Forms 1095-A/B/C
(Required for compliance with the Affordable Care Act – (employer, insurance co. or state exchange).
- ___ 3. Completed Interview Questionnaire – 2025
(Please tell us what’s new this year!)
- ___ 4. Documents for establishment, contributions and distributions for Health Savings
Accounts (HSA) (Form 1099-SA; etc.)
- ___ 5. Completed personal worksheets - income and deductions. All 1099’s you filed.
- ___ 6. 2025 Escrow statements (includes sales, new purchases and refinances)
- ___ 7. Property tax bill if purchased rental property. (For assessed tax values)
- ___ 8. 1099 Forms reporting all stock sales for 2025, as well as purchase date and cost basis information (Form 8949)
Include ANY/ALL CRYPTO wallet transactions
- ___ 9. 1099 Forms reporting unemployment compensation, state tax refunds (1099-G),
Pensions(1099-R) and social security benefits(1099-SSA) received.
- ___ 10. 5498 Forms reporting all IRA balances and accounts, including ROTH IRA’S.
- ___ 11. Social Security numbers and birth dates of all dependents (if not previously supplied)-NO ITIN’S
(The IRS / FTB will reject the return if this information is not accurate).
- ___ 12. 2024 and/or 2023 tax returns (new clients only).
- ___ 13. All year-end mortgage loan statements, Forms 1098, including those refinanced or
paid off during the year.
- ___ 13A. Auto loan interest-F1098 VLI-Originated in 2025
- ___ 14. 1099 Forms reporting all IRA’s transferred or distributed, Roth IRA
Contribution or Conversion (1099-R)
- ___ 15. Record of Federal and State estimated tax payments made.
- ___ 16. Name, address, phone and social security numbers of all childcare providers.
Required for childcare credit. Needed even if paid through a flex spending account.
- ___ 17. Any IRS or Franchise Tax Board Correspondence received during the year.
- ___ 18. All escrows and paperwork regarding any foreclosure or short sale of real property.
(Including all forms 1099-C, 1099-A, and CA F-3895)
- ___ 19. All tuition statements from higher education institutions (Form 1098-T).
- ___ 20. Charitable contributions even if taking the standard deduction.
- ___ 21. Signed Form 8332 for dependents of non-custodial (physical) divorced parents.
- ___ 22. Documents regarding all stock options granted and exercised.
- ___ 23. Auto purchase contract if purchased before 9/30/2025.
- ___ 24. Solar contract for home (no longer allowed after 12/31/2025)

Please provide any documents you think are necessary for preparation