
2025 TAX INFORMATION NEEDED – PLEASE READ CAREFULLY

- Your completed personal organizer and signature page.
- If you are a **new client**, please include a copy of the last tax return filed for you.
- All forms W-2, and 1099, including 1099-MISC, 1099-NEC, 1099-R, and 1099-SSA.
- Interest income: *Banks are not required to issue a 1099-INT if the amount is less than \$10.*
- Crypto-currency information: Disclosure is an IRS requirement even if you had no trades/sales.
- Brokerage statements: Personal investments only, not for accounts owned by your IRA.
- Form 1095-A: ***Missing this form is the most common reason for tax return rejection! An additional fee will be charged for missing forms 1095-A after E-file rejection.***
- Business income: If you have always provided your income and expenses in a certain manner, continue to do so.
- Farming income: Again, if you have your own way of reporting this, continue to do so.
- Rental income: Airbnb, VRBO; if you rented a portion of your home, a vacation home, or simply had a regular rent house, I need to know about it. I have handouts that can help you organize this information.
- Itemized Deductions: Medical (out-of-pocket only), Charitable contributions, mortgage interest, and real estate taxes. Keep in mind that very few will qualify to itemize (go “long” form).
- Due Diligence: I am required to practice due diligence in determining qualifications for certain tax credits, deductions, and filing status. Please be prepared to answer questions if you normally claim Earned Income Credit, Child Credit, College credits, and Head of Household status (which is only for single parents).
- Childcare credit: Please include the name, address, and taxpayer ID number of the caregiver and break down the amounts paid by child and by caregiver.
- If you gained a dependent child, either through birth, adoption, or guardianship, include a copy of their social security card.
- If your adolescent child files a return, **be sure they do not claim themselves**. It won’t change their refund, but it will change yours.
- **Touch Fee: This is a fee that might be charged if multiple attempts are required to obtain complete information necessary to finalize your return.**

Any information you receive where the envelope is marked: **Important Tax Information** should be included. Watch out for paperless! Things you may be required to download include brokerage statements, insurance marketplace (subsidy) forms 1095-A, form 1098 for your mortgage interest, and form 1098-T for college tuition reporting.

Please do not send receipts, a written itemization of the totals is sufficient. However, keep the receipts for proof in the event of an audit. If you are unsure of the deductibility of something, include the paperwork and questions.

You are free to call me if you have any questions about what to send. Please **do not email or text your paperwork!** Either scan (PDF only) and upload to your secure or send via USPS to my PO Box or delivery service to my street address.