



2025 Personal Income Tax Checklist

Personal Deduction

Collect supporting documentation for any of the following expenses that apply to you.

- Charitable Contributions and Donations**
Detailed list of contributions, receipts for donations, and Form 1098-C for vehicle donations or a letter of confirmation from the qualified charity.
- Homeowner Expenses**
Form 1098 mortgage interest statements, property tax payment receipts, and receipts for qualified energy efficiency upgrades (certification if provided by the vendor).
- Child and Dependent Care Expenses**
Name, address and Tax ID number or Social Security number of the care provider. The amount paid for care during the tax year.
- Health Care Expenses**
1095 Forms (for health care coverage) and all records of medical, dental and vision costs for the tax year.
- Education Expenses**
Itemized receipts for qualified educational expenses, tuition statements (Form 1098-T), student loan interest statements (Form 1098-E).
- Job-Related Educational Expenses**
Detailed records of the expenses
- IRA Contributions**
Form 5498
- Health Savings Account Contributions**
Form 5498-SA

Personal Information and Income

- You, Your Spouse and Your Dependents**
Last year's return, full legal name, date of birth, Social Security number, driver's license number, issue, and expiration dates.
- Personal Earnings Statements**
Form W-2's (for you and your spouse) and all 1099 forms
- State and Local Tax Refunds and Unemployment Income**
1099-G forms
- Health Savings Distributions**
1099-SA (distribution document)
- Long-Term Care Reimbursements**
1099-LTC (distribution document)
- Interest and Investment Income**
Form 1099-INT, 1099-DIV, 1099-B and Schedule K-1
- IRA's, Pensions and Annuities**
1099-R forms
- Social Security and RRB Income**
SSA-1099 and RRB-1099
- Trust and Estate Beneficiary Earnings**
Form 1041, Schedule K-1
- Home or Property Sale**
Form 1099-S

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Personal Deduction (Continued)

Self-Employment Expenses

Detailed records of business and home office expenses, assets, pension plan contributions, health insurance payments, estimated tax payments (federal and state).

State and Local Taxes

Some state and local taxes withheld/paid and sales taxes may be tax deductible.

Vehicle Loan Interest

Some interest paid on a new vehicle loan may be tax deductible.

Qualified Overtime Pay and Qualified Tip Income

Some overtime pay and tip income may be excludable from taxable income.