

2025 Tax Preparations

Income:

	Totals -for the whole year
w-2's	<hr/>
1099-int (interest)	<hr/>
1099-div(dividends)	<hr/>
1099-(G)tax refunds	<hr/>
Alimony received	<hr/>
1099-MISC(income)	<hr/>
1099-NEC (income)	<hr/>
1099-B(capital Gain/loss Brokerage account)	<hr/>
Sale of any property/assets	<hr/>
1099-R (IRA/401K/PENSION DISTRIBUTIONS)	<hr/>
k-1 (Business income/loss)	<hr/>
1099-G (unemployment)	<hr/>
1099-SSR (Social Security)	<hr/>
Other income	<hr/>

Income Adjustments:

Teacher expenses	<hr/>
Health Savings Account	<hr/>
SEP/SIMPLE Contributions	<hr/>
SE Heath Insurance premiums	<hr/>
Contributions to IRA's	<hr/>
1098-Student loan interest	<hr/>
Tuition and fees (college)	<hr/>

Deductions and Credits:

Medical & Dental Expenses:

Insurance premiums: _____

Co-pays & doctor/professionals: _____

Lab & x-ray: _____

Prescriptions: _____

Therapy & long term care cost: _____

Eye care: _____

Dental expenses: _____

Mileage/travel expenses: _____

Other medical expenses: _____

Taxes: _____

Real estate taxes paid: _____

Local & State Taxes paid: _____

Sales Tax paid: _____

Foreign Taxes paid: _____

Estimated taxes paid: _____

Home Expenses:

Mortgage interest (1098-int): _____

Mortgage insurance premiums (PMI insurance): _____

Energy improvements: _____

Windows/Exterior doors: _____

Installation: _____

Other home improvements: _____

Energy Improvements: (solar, roof, heat pump, etc) _____

Charity donations and Gifts:

Cash:

Who: _____ When: _____ How much: _____

Items:

What: _____ To Whom: _____ When: _____

Mileage:

Why: _____ When: _____ For Whom: _____ How many: _____

Other items:

What: _____ when: _____ to whom: _____ how much/cost: _____

misc Expenses:

union dues _____

work expenses _____

Child/dependent Care

Child care: who: _____ when: _____ how much paid: _____

Education expenses: (1098-T): _____

Where: _____ for whom: _____ how much: _____

Retirement Savings contributions:

401(K)'s: _____

Traditional, SEP, SIMPLE, IRA's: _____

ROTH Contributions: _____

Did you have Tip income? _____

Did you work overtime? _____

Business Expenses: Schedule C preparations:

Gross Receipts/Income (1099-misc/nec) :

Advertising:

Business Travel:

Lodging:

Transportation:

Meals :

Other:

Commissions and Fees:

Communication:

Contract Labor:

Insurance

Health:

Business:

Workman's Comp:

Interest:

Legal and Professional fees:

Meals

Office Expenses:

Rental Expenses:

Repairs & Maintenance:

Supplies:

Taxes & Licenses:

Utilities:

Postage:

Printing:

Dues & Subscriptions:

Memberships:	<hr/>
Bank Fees:	<hr/>
Mileage:	<hr/>
tolls:	<hr/>
Parking:	<hr/>
Home office deduction:	
Size of office:	<hr/>
Utilities total for house:	<hr/>
Decor:	<hr/>
Research & Development	<hr/>
Credit Card Process fees:	<hr/>
Uniforms:	<hr/>
Business Gifts	<hr/>
Conferences/Training/Education	<hr/>
Equipment purchases (below \$2500 ea)	<hr/>
Equipment purchases (above \$2500 ea)	<hr/>
Computer and Internet Expenses	<hr/>