

2025 Tax Preparations

Income:

Totals -for the whole year

w-2's

1099-int (interest)

1099-div(dividends)

1099-(G)tax refunds

Alimony received

1099-MISC(income)

1099-NEC (income)

1099-B(capital Gain/loss Brokerage account)

Sale of any property/assets

1099-R (IRA/401K/PENSION DISTRIBUTIONS)

k-1 (Business income/loss)

1099-G (unemployment)

1099-SSR (Social Security)

Other income

Income Adjustments:

Teacher expenses

Health Savings Account

SEP/SIMPLE Contributions

SE Heath Insurance premiums

Contributions to IRA's

1098-Student loan interest

Tuition and fees (college)

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