



2025 Tax Documents Checklist

Please return this completed sheet with your 2025 tax documents

Please provide your email address and phone number:

Spouse's email address and phone number (if filing a joint tax return):

Required Questions:

* Please provide us with your Driver's License info (attached to this checklist)

* For direct deposit of refund(s), please provide your bank's routing number and your account number

*****The IRS is phasing out the issuance of paper refund checks as of 9/30/2025 to protect taxpayers and speed up the receipt of refunds. We strongly recommend providing us with this information and updating it with us each year.**

Routing:

Account:

* Regarding digital assets (e.g. Bitcoin) At any time during 2025, did you: (a) receive; or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? If you sold, please provide a summary that includes dates of purchase and sale, total proceeds, total basis (what you originally paid for it).

Yes

No

* Did you and all members of your household have health insurance in 2025?

Yes

No

Tax Documents and Informational Items:

- All W-2s and 1099 forms (interest, dividends, retirement, Social Security, gambling, subcontracting, etc.)
 - Your employer may provide a supplemental statement detailing overtime wages. If you earned qualified overtime wages that are not detailed, please provide your total overtime premiums received in 2025.
- K-1s from any LLC, Partnerships, S Corporations, Trusts or Estates
- If you received Unemployment, Disability or Family Leave payments from the State, please log into the state website to retrieve the year-end tax statement – [Form 1099-G](#).
- If you own a home, please provide: Mortgage interest statement (Form 1098), Real estate taxes (postcard from your town), and sewer tax, if applicable

- If you purchased and financed a qualified new car in 2025, please provide the make, model, VIN, loan origination date, and total interest paid in 2025. You can read more about this new deduction on our website [here](#).
- Real estate closing statement (HUD-1/Closing Disclosure) if you bought, sold or refinanced real estate in 2025
- Tuition statements (Form 1098-T) and Student loan interest (Form 1098-E)
- If you obtained health insurance through the Exchange (aka: Marketplace, healthcare.gov) please provide us with Form 1095-A.
- Estimated tax payments for 2025 made to the IRS and/or state - provide exact amounts and dates or confirmations if the payments were made online.
- If you contributed to a retirement plan outside of your job, please let us know how much you contributed and what type of account you contributed to (e.g. traditional IRA, Roth IRA, SEP IRA, etc).
- Daycare expenses: please provide an **annual statement** from the provider(s). This statement must include the provider's name, address, tax ID number, your child's name, and the annual total paid for services.
- If you are a tenant, please enter the total rent paid in 2025 \$
- Total charitable contributions substantiated by receipts. **Please keep receipts in your possession; only provide us the total amount \$** **Blank responses are assumed to be \$0**
- If you donated to an approved state-designated scholarship organization, please provide a receipt.
- Total out-of-pocket medical costs (health insurance premiums, doctor's co-pays, prescriptions, eyeglasses/contacts, etc.) \$ **For your privacy, DO NOT give us your medical receipts or statements (keep in your possession). Please only provide the total amount you paid. Blank responses are assumed to be \$0**
- If you had a Health Savings Account (HSA), please provide forms 5498-SA/1099-SA, if applicable.
- If you married, divorced, or moved in 2025 please inform us.
- If your child is filing their own tax return, let us know if they claimed themselves or if they are your dependent.
- If you have a bank account in a foreign country, please let us know the details; **it is required to be reported.**
- If you had a baby in 2025 (congratulations!), please provide the following information for the baby:
 - Full name
 - Gender
 - Social Security Number
 - Date of birth
- If you installed energy-efficient home improvements (e.g. exterior doors, windows, skylights, insulation) or residential clean energy systems (e.g. solar panels) [please read this resource directly from the IRS](#) then provide:
 - Type of improvement
 - Installation date
 - Total cost
 - Any relevant Energy Star or energy efficiency certification details (keep receipts for your own records)
- If you or your spouse have an IRS Identity Protection Pin for 2025, please provide the IRS letter.

Each taxpayer's driver license or state identification information is now required in order to file each return.

Taxpayer's Name:

Driver's License or State-Issued ID

ID#

Issue Date

Expiration Date:

Issuing State:

Document # (New York IDs only):

IF APPLICABLE:

Spouses's Name:

Driver's License or State-Issued ID

ID#

Issue Date

Expiration Date:

Issuing State:

Document # (New York IDs only):