

Tax Appointment Worksheet



The Tax Appointment Worksheet is a tool to help you gather the needed information for the 2025 tax return. The 2025 worksheet will reflect the changes made by the One Big Beautiful Bill Act.

Event		Documents or information needed	Event		Documents or information needed
1	Got married, divorced, or separated	<ul style="list-style-type: none"> Married – Prior year return of both spouses Divorced – Finalized date; copy of the divorce decree Separated – Copy of the separate maintenance agreement Community property income allocation 	10	Sale of stocks, bonds, etc. (including mergers), cryptocurrency	<ul style="list-style-type: none"> Form 1099-B or other sale documents; basis or original costs
	Date of event _____			Purchase of stocks, bonds, etc., personal residence, or other real estate	<ul style="list-style-type: none"> Purchase documents; closing papers
2	Children - Birth or adoption	<ul style="list-style-type: none"> Social Security cards and adoption papers 	11	Virtual currency (Cryptocurrency)	<ul style="list-style-type: none"> Buy, sell, receive, exchange or dispose of? Back up documents (Form 1099-DA (new for 2025))
	Adoption credit	<ul style="list-style-type: none"> Date and amount of expenses, date of adoption, special needs certification 		Inheritance	<ul style="list-style-type: none"> Will; Schedule K-1 from the estate, basis information
	Child tax credit, EIC, HH	<ul style="list-style-type: none"> Proof child lives in household 	12	Gifts made	<ul style="list-style-type: none"> Cash or property in excess of \$19,000 per person. Description of property given, basis, donee name:
3	Death of child or spouse	<ul style="list-style-type: none"> Date of death 		Gifts received	<ul style="list-style-type: none"> Property – Basis in hands of donor
4	Additional members of household	<ul style="list-style-type: none"> Date of occupancy and relationship 		Trade of real property	<ul style="list-style-type: none"> Date of trade, property given up, property received, basis and FMV; qualified intermediary sales agreements or closing papers
5	Job change	<ul style="list-style-type: none"> Start date Name of new employer W-2s from new and old employers 	13	Trade-in of personal property used for business (ex. Auto) (Deemed sale)	<ul style="list-style-type: none"> Date of trade, value received for trade in, cost basis of property given up
6	Unemployment	<ul style="list-style-type: none"> Unemployment form (may need to be downloaded) 		Start or end a small business (Schedule C, LLC, S or C corp., Partnership)	<ul style="list-style-type: none"> Formation or termination dates: Property contributions or distributions Schedules K-1, if applicable
7	Retirement contribution	<ul style="list-style-type: none"> Type of plan Amount of contribution 		Business income/ Expenses	<ul style="list-style-type: none"> Forms 1099-K received for credit card or PayPal-type payments: Inventory numbers, if applicable:
	Retirement distributions	<ul style="list-style-type: none"> Form 1099-R: Rollovers, Roth conversions, inheritance RMD information if age 73 or older as of Dec. 31 	14	Business miles (70 cents per mile) No longer allowable for employees	<ul style="list-style-type: none"> Total b PayPal-type usiness miles driven per vehicle Total miles driven per vehicle (all purposes)
	Transfers from IRAs to charities	<ul style="list-style-type: none"> Direct transfer to charity? Yes Amt: Brokerage statement showing transfer 			
9	Social Security benefits	<ul style="list-style-type: none"> Form 1099-SSA 			



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15	Lawsuit settlements	• Date received; reason for the settlement; 1099-MISC	24	Educational expenses for students	• Form 1098-T for the student • Actual expense records for books, etc. • Financial transcript from school needed • Form 1099Q – If distributions from 529/530 Plans
	16 Rental property	• Income; expenses; new property purchased		Student loan interest	• Interest record for student loans; Form 1098-E
	17 Prizes	• Form 1099-MISC; value of prizes not included on Form 1099-MISC	25	Child or disabled spouse care	• Name, address, and ID number of the day care provider; the amount paid to the provider; and whether the provider comes into your home.
18 Lottery or gambling winnings	• Forms W-2G, losses and other winnings			26 Energy credit	• Documents showing the purchase of qualified energy property for residential or commercial use such as clean energy vehicles, furnaces, exterior doors, and windows
19 Health insurance, medical, dental, or drug expenses	• Post-tax health insurance premiums including Form 1095-A for marketplace insurance; totals of other medical, dental, and drug expenses. • Health Savings Account (HSA) (1099-SA) information.			27 Bankruptcy filing	• Date filed • Bankruptcy papers - property rejected/ returned by court
	Medical miles (21 cents per mile)	• Total medical miles driven during the year	28	Debt forgiveness or abandonment of property	• Form 1099-A for abandonment • Date property was taken by the bank or sold in foreclosure • Form 1099-C for cancellation
	Market place health insurance coverage verification	• Form 1095-A, B, or C must be received from the marketplace, the insurance carrier, or your employer for every person included on the tax return.		29 IRS or state communications	• Letters, additional taxes paid, changes in prior year returns, installment agreements or offers in compromise
20 State taxes paid: income; property taxes; sales tax on vehicles, motorcycles, or homes	• Prior year's Income tax return; property tax bills; closing papers from the purchase or sale of property; letter from the state regarding any change in a prior filed return			Identity protection PIN (5 digits)	• Letter including IP PIN. Or information from ID.ME (IRS)
	21 Home mortgage interest	• Forms 1098: Description of use of the borrowed money	30	Government subsidies or payments	• ERC, PPP, grants, loan forgiveness documents
	22 Charitable contributions of money, property, or out-of-pocket expenses	• Date and type of contributions, knowledge that receipts from the organizations have been received; statement regarding whether goods and service were received for donation • Form 1098-C for vehicle or boat donations		Identification	• Current driver's license or government issued ID
23 Classroom expenses for K-12 teachers, administrators, and counselors	Charitable miles (14 cents per mile)	• Total charitable miles driven during the year		Foreign Investments or holdings	• Any foreign accounts or signature authority? Did total exceed \$10,000 at any time during the year? • Foreign business interests or stock of \$50,000 or more?"