

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



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15	<b>Lawsuit settlements</b>	<ul style="list-style-type: none"> <li>Date received; reason for the settlement; 1099-MISC</li> </ul>	24	<b>Educational expenses for students</b>	<ul style="list-style-type: none"> <li>Form 1098-T for the student</li> <li>Actual expense records for books, etc.</li> <li>Financial transcript from school needed</li> <li>Form 1099Q – If distributions from 529/530 Plans</li> </ul>
16	<b>Rental property</b>	<ul style="list-style-type: none"> <li>Income; expenses; new property purchased</li> </ul>		<b>Student loan interest</b>	<ul style="list-style-type: none"> <li>Interest record for student loans; Form 1098-E</li> </ul>
17	<b>Prizes</b>	<ul style="list-style-type: none"> <li>Form 1099-MISC; value of prizes not included on Form 1099-MISC</li> </ul>	25	<b>Child or disabled spouse care</b>	<ul style="list-style-type: none"> <li>Name, address, and ID number of the day care provider; the amount paid to the provider; and whether the provider comes into your home.</li> </ul>
18	<b>Lottery or gambling winnings</b>	<ul style="list-style-type: none"> <li>Forms W-2G, losses and other winnings</li> </ul>	26	<b>Energy credit</b>	<ul style="list-style-type: none"> <li>Documents showing the purchase of qualified energy property for residential or commercial use such as clean energy vehicles, furnaces, exterior doors, and windows</li> </ul>
19	<b>Health insurance, medical, dental, or drug expenses</b>	<ul style="list-style-type: none"> <li>Post-tax health insurance premiums including Form 1095-A for marketplace insurance; totals of other medical, dental, and drug expenses.</li> <li>Health Savings Account (HSA) (1099-SA) information.</li> </ul>	27	<b>Bankruptcy filing</b>	<ul style="list-style-type: none"> <li>Date filed</li> <li>Bankruptcy papers - property rejected/returned by court</li> </ul>
	<b>Medical miles (21 cents per mile)</b>	<ul style="list-style-type: none"> <li>Total medical miles driven during the year</li> </ul>	28	<b>Debt forgiveness or abandonment of property</b>	<ul style="list-style-type: none"> <li>Form 1099-A for abandonment</li> <li>Date property was taken by the bank or sold in foreclosure</li> <li>Form 1099-C for cancellation</li> </ul>
20	<b>State taxes paid: income; property taxes; sales tax on vehicles, motorcycles, or homes</b>	<ul style="list-style-type: none"> <li>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</li> </ul>	29	<b>IRS or state communications</b>	<ul style="list-style-type: none"> <li>Letters, additional taxes paid, changes in prior year returns, installment agreements or offers in compromise</li> </ul>
21	<b>Home mortgage interest</b>	<ul style="list-style-type: none"> <li>Forms 1098: Description of use of the borrowed money</li> </ul>		<b>Identity protection PIN (5 digits)</b>	<ul style="list-style-type: none"> <li>Letter including IP PIN. Or information from ID.ME (IRS)</li> </ul>
22	<b>Charitable contributions of money, property, or out-of-pocket expenses</b>	<ul style="list-style-type: none"> <li>Date and type of contributions, knowledge that receipts from the organizations have been received; statement regarding whether goods and service were received for donation</li> <li>Form 1098-C for vehicle or boat donations</li> </ul>	30	<b>Government subsidies or payments</b>	<ul style="list-style-type: none"> <li>ERC, PPP, grants, loan forgiveness documents</li> </ul>
	<b>Charitable miles (14 cents per mile)</b>	<ul style="list-style-type: none"> <li>Total charitable miles driven during the year</li> </ul>		<b>Identification</b>	<ul style="list-style-type: none"> <li>Current driver's license or government issued ID</li> </ul>
23	<b>Classroom expenses for K-12 teachers, administrators, and counselors</b>	<ul style="list-style-type: none"> <li>These may be used as the \$300 above-the-line deduction. They also include the cost of professional development classes related to the curriculum of the educator.</li> </ul>		<b>Foreign Investments or holdings</b>	<ul style="list-style-type: none"> <li>Any foreign accounts or signature authority? Did total exceed \$10,000 at any time during the year?</li> <li>Foreign business interests or stock of \$50,000 or more?"</li> </ul>