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Tax Year 2025 Checklist

Check Yes or No for each item below and provide **ALL** documents or forms that apply to your tax return

Yes No
- ☐ ☐ **Signed** Tax Preparation Agreement (included on the back of this page)
- ☐ ☐ **Completed** Tax Worksheet (included in this mailing)
- ☐ ☐ **Do you want the Holistiplan Tax Report as an add on with your tax return?** ($50 add on)

Yes No
- ☐ ☐ W-2 – please provide your final paystub for 2025 to calculate any tips or OT deductions
- ☐ ☐ 1099-R – Retirement income from distributions/rollovers from IRA/401(k)/403(b)/pension/other retirement accounts
- ☐ ☐ 1099-INT – Interest income from banks, credit unions, or other financial institutions
- ☐ ☐ 1099-DIV – Dividend income from financial accounts
- ☐ ☐ 1099-B – Sales of stocks/mutual funds/bonds, may be listed on a 1099-Composite form – Provide ALL pages
- ☐ ☐ SSA-1099 – Social Security income
- ☐ ☐ 1099-G – Unemployment, CRP, or other income received from government agencies
- ☐ ☐ 1099-MISC – Miscellaneous income
- ☐ ☐ 1099-NEC – Non-Employee Compensation income – this will usually require filing a Schedule C form
- ☐ ☐ W-2G – Gambling income
- ☐ ☐ Sale of home/second home/real estate land/property
- ☐ ☐ Self-Employment and Child Care income – Complete our Schedule C worksheet and provide all 1099-MISC or 1099-NEC forms
- ☐ ☐ Rental Income – Complete our Schedule E worksheet and provide all 1099-MISC or 1099-NEC forms
- ☐ ☐ Farm Rental Income – Complete our Farm Rental Income worksheet and provide all 1099-MISC, 1099-NEC, or 1099-G (CRP) forms
- ☐ ☐ K-1 – Income from Partnerships, Trusts, or Estates
- ☐ ☐ 1099-LTC – Distributions from Long-Term Care and Accelerated Death Benefits policies
- ☐ ☐ 1099-K – Income from an online vendor or credit card processor as a result of you selling goods or services
- ☐ ☐ 1099-C or 1099-A – Cancellation of Debt or Property Foreclosures
- ☐ ☐ 1099-Q – Distributions from Qualified Education Programs – Complete the Higher Education section of the following worksheet
- ☐ ☐ 1099-DA – Digital Asset Proceeds from Broker Transactions
- ☐ ☐ Alimony received $___________ Date of Divorce Decree_______________________
- ☐ ☐ **Did you receive any other income not listed above? If yes, provide all documents or forms**

Yes No
- ☐ ☐ Dependent/Child – Complete the Dependent/Child section of the following worksheet
- ☐ ☐ Childcare Expenses – Provide statement(s) from childcare provider for each child
- ☐ ☐ 1095-A – Summary report of health insurance purchased through MNSure or other state/federal marketplaces/exchanges
- ☐ ☐ 1099-SA – Distributions from a Health Savings Account Was the distribution used for medical expenses? Yes / No
- ☐ ☐ 5498-SA – Contributions to a Health Savings Account $________ Enter here if not shown on your W-2
- ☐ ☐ 1098-Mortgage Interest – Indicate whether or not the debt was used to buy, build, or improve the home that secures the loan
- ☐ ☐ 1098-VLI – Vehicle Loan Interest Statement – or a document from the lender showing qualified passenger vehicle loan interest
- ☐ ☐ Medical Expenses – Complete the Insurance Premiums and Medical Expenses section of the following worksheet
- ☐ ☐ Charitable Contributions – Complete the Charitable Contributions section of the following worksheet
- ☐ ☐ IRA/SEP Contributions – Traditional or Roth – Complete the Retirement Accounts section of the following worksheet
- ☐ ☐ 1098-T – Tuition Statement for Higher Education – Complete the Higher Education section of the following worksheet
- ☐ ☐ Quarterly Estimated Tax Payments – Complete the Estimated Tax Payments section of the following worksheet
- ☐ ☐ 1098-E – Student Loan Interest Paid – Complete the Student Loan Payment section of the following worksheet
- ☐ ☐ Alimony paid $___________ Recipient's Name:______________________ Recipient's SSN:______________________
- ☐ ☐ MN Specific Information – MN Property Tax Statement or MN Certificate of Rent Paid, Long-Term Care Insurance, MN K-12 Expenses, 529 Plan Contributions – **Complete the MN Specific Information section of the following worksheet**

Yes No
- ☐ ☐ Did the IRS assign you an identity theft PIN? – Provide the IRS letter with the new tax year 2025 PIN for each person affected
- ☐ ☐ Please provide a copy of any letters or notices you received from the IRS or state revenue departments
- ☐ ☐ Did you make any gifts in excess of $19,000 to any one person in 2025?
- ☐ ☐ For **NEW CLIENTS**: We require a copy of last year's tax returns – Provide ALL pages of your Federal and State tax returns