

2025 INFORMATION NEEDED TO PREPARE YOUR INCOME TAX RETURN

PLEASE BRING ALL DOCUMENTS: **W-2'S, 1099's, K-1, Rent Paid**

OTHER INCOME

- Dividends_____
- Savings-interest_____
- Social security_____
- Retirement(1099-R)_____
- Unemployment_____
- Sale of stocks_____
- Rental income_____
- Gambling winnings_____
- Self employment_____

DEDUCTIONS & EXPENSES

- Teacher_____
- IRA deposits_____
- Day care: Who ,SS#, address, phone
- Self employed health ins_____
- Student loan Interest_____
- Tuition & books (FORM 1098-T REQUIRED)

MEDICAL BILLS PAID BY YOU

- Prescriptions_____
- Insurance_____
- Chiropractor_____
- Dentist_____
- Doctor-clinic_____
- Hospital_____
- Glasses-contacts_____
- Mileage (Must be written)_____
- Nursing home ins (list individually)

CONTRIBUTIONS

- Cash_____
- Non-Cash_____

ESTIMATED TAXES

- 1st Quarter_____
- 2nd Quarter_____
- 3rd Quarter_____
- 4th Quarter_____

DEDUCTIBLE TAXES PAID

- House & mobile home_____
- Cabin & land_____
- Personal property_____
- Automobile tabs_____

INTEREST PAID

- Home mortgage_____
- 2nd mortgage_____
- Home equity loan_____
- Land contract (paid to, soc sec # and address)_____
- Closing papers (2024 home purchased or refinanced)_____

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