

T.A.X.E.S.

Tax & Accounting eXtra Easy Solutions

34 S Marvin Lane PO Box 1107 Waynesville OH 45068 513-897-1040

Name _____ Date _____

Phone number: _____ e-mail: _____

YES	NO	GENERAL QUESTIONS
		Did / Do you receive, sell, exchange, or dispose of a digital asset? (i.e., NFTs, BitCoin, Coinbase, Crypto, etc.)?
		Did / Do you have any Foreign bank accounts and/or investments?
		Did you purchase and install energy-efficient items? (windows, furnace, insulation, etc.)
		1099-K (i.e. PayPal, Venmo, Zelle etc.) Did you receive this form?
		OTHER INDIVIDUALS IN YOUR HOUSEHOLD or ON YOUR TAX RETURN:
		Provide proof they lived with you in 2025 (report cards, medical records, daycare expense). If "new", please provide SS Card and Birth Certificate
		Names & Ages:
		TAX INFORMATION / FORMS CHECKLIST
		Identity Protection Pin letter from IRS
		W2's for wages, salary, sick leave, overtime, tips from EACH employer
		1099-R for Retirement, Pensions, Annuities, and / or IRAs
		SSA-1099 for Social Security, Disability or Railroad Retirement Benefits
		1099-INT Interest from Checking/Savings Accounts, Bonds, CDs, Brokerage.
		1099-DIV Dividends from Stocks, Mutual Funds, Brokerage
		1099-B Proceeds from sale of stocks, bonds, or other investments
		Brokerage Statement(s) 1099s (DIV, INT, B, R, 1099 DA & more)
		1099 DA Digital Assets Proceeds
		1099-G for Unemployment compensation and/or State/local refund
		1099-NEC Non-Employee Compensation
		1099-MISC Rental income, Royalties, other income
		Sch K-1 from Partnership, Estate, Trust, S-Corps
		1099-SA Health Saving Account (HSA) distributions
		5498-SA Health Saving Account (HSA) contributions
		1098-T College or post-Secondary education expenses and scholarships DOWNLOAD
		1098-E Student Loan interest
		1095-A Health Insurance via ACA Marketplace / Exchange / ObamaCare
		1098 Mortgage interest paid
		OTHER INCOME
		Other INCOME (Alimony received, Gambling, Lottery, prizes, Awards, jury duty, foreign income, sale of house, UBER / LIFT, Fantasy sport league, cancelled debt, etc.) Specify

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YES	NO	BUSINESS INFORMATION CHECKLIST
		Business (Self-employment) Income, Expenses, New Assets/purchases. Trade-ins
		Rental property Income, Expenses, new assets / purchases, Sold property
		Farm Income, Expenses, New Assets, trade-ins
		WAYS WE CAN REDUCE TAXES / INCREASE REFUNDS
		Daycare expenses for child(ren) or other dependent(s).
		Educator supplies (K-12) Amount \$ _____
		Contributions to retirement Account OTHER THAN through Work? Which? _____ IRA _____ 401K _____ Roth IRA _____ Other
		Alimony Paid
		Medical & Dental expenses – Doctor, Dentist, Hospital, Nursing Home, Labs, RX, eyeglasses, hearing aids, etc. Miles _____
		Health Insurance Premiums (other than thru Work/payroll and SS withholding)
		Long Term Care Premiums
		Charity Contributions as CASH _____ as ITEMS _____ Miles _____
		Taxes paid (State, Real Estate, Personal Property, Sales)
		Estimated tax payments? Who _____ How much \$ _____
		529 Contributions? Who _____ How much \$ _____
		Purchase and Finance a New Vehicle that qualifies with interest paid in 2025?
		Did you receive a lumpsum Social Security distribution in 2025?
		LIFE EVENTS
		Gift more than \$19,000 (cash or fair market value) to another person
		Inherit an IRA, Annuity, real estate, other?
		Did you move or change your mailing address?
		Do you have a different phone number or e-mail address?
		Did your marital status change (married, divorced, widowed)?
		Do we have current copies of your (& spouse) driver's license(s)?
		Do we have current checking account info for Direct Deposit and/or Payments?
		Is there someone you would like us to contact if you are unable to make decisions about your tax returns? _____ E-mail _____ _____ Name _____ Phone _____
		Signature: _____ Date _____