



# 2025 Tax Document Checklist (Check Documents You Have)

## New Clients

<input type="checkbox"/>	Social Security cards for everyone on return
<input type="checkbox"/>	Dates of birth for everyone on the return
<input type="checkbox"/>	Copy of 2024 tax return

## All Clients

<input type="checkbox"/>	W2s for all taxpayers
<input type="checkbox"/>	1099 INT for interest paid
<input type="checkbox"/>	1099 DIV for all dividends paid
<input type="checkbox"/>	Consolidated Brokerage Statements
<input type="checkbox"/>	Virtual Currency Statements
<input type="checkbox"/>	All forms K1
<input type="checkbox"/>	All 1099 NEC, 1099 MISC, and 1099Ks
<input type="checkbox"/>	Records of any other income
<input type="checkbox"/>	Amounts of State/Local Taxes paid in 2025
<input type="checkbox"/>	Student Loan Interest paid
<input type="checkbox"/>	Records of Daycare Expenses
<input type="checkbox"/>	Real Estate Settlement Stmtns (new or refi)
<input type="checkbox"/>	Records of Missouri Credits

<input type="checkbox"/>	1099Rs for all retirement distributions
<input type="checkbox"/>	1099 for all Social Security payments
<input type="checkbox"/>	1099 for Railroad Retirement payments
<input type="checkbox"/>	1099 G for unemployment received
<input type="checkbox"/>	W2G for gambling winnings
<input type="checkbox"/>	Records of gambling losses
<input type="checkbox"/>	Records of Rental Income and Expenses
<input type="checkbox"/>	Records of Business Income and Expense
<input type="checkbox"/>	Records of Farm Income and Expense
<input type="checkbox"/>	Records of Alimony Paid or Received
<input type="checkbox"/>	Records of Teachers out-of-pocket expenses
<input type="checkbox"/>	Records of Retirement Acct Contributions
<input type="checkbox"/>	1098Ts and Other Educational Expenses
<input type="checkbox"/>	1095A for Obamacare Premiums
<input type="checkbox"/>	Mortgage Interest 1098s
<input type="checkbox"/>	Records of all estimated payments
<input type="checkbox"/>	Records of all 529 plan contributions
<input type="checkbox"/>	Direct Deposit Information

## How to Use This Form

Highlight all items that apply to you. Use the margins to write in the number of items expected. For instance, if you and your spouse held 3 jobs between you, then next to the W2 line write 3. Once all forms of that type are received, check the box. When all of the highlighted boxes are checked, you're ready for your tax appointment.

Use the reverse side to tally your itemizable expenses, even if you can't itemize. There are certain state deductions where they may matter.

## Help Us Help You

We want to ensure you pay the least tax—receive the largest refund possible. Here are a few tips to keep in mind to prepare for your tax interview.

Make a list of any questions ahead of time so you don't forget to ask.

Please don't highlight your tax documents—highlighter does not scan well and often blackens the amount highlighted.

If there's something you think we should know, tell us. We aren't mind readers and we might forget to ask, but we do want to assist you.