

Drop Off/Mail In Checklist

Name:

E-mail address:

Phone Number -

Direct Deposit Info - Name of Bank/Last 4 of Routing & Account Numbers

Did you collect Unemployment? Is the 1099-G included?

You must download and print the 1099G from the State Dept of Labor website, this form is not mailed to you.

Were you paid Overtime in 2025?

We will need a statement from the employer or paystub clearly identifying the qualified OT amount.

College Cost Information

Any dependents in college? Provide Form 1098-T and the amount spent on books

Medical Expenses/Health Insurance

Prescriptions, doctors, glasses, contacts, chiropractors, dentists, hearing aides, & medical miles
Was everyone on the return covered by insurance all 12 months? If not, what months & who was not covered?

Residential Energy Credits

Amount spent on New Energy Efficient Property. Each improvement is listed separately.

Windows	Doors	Air Conditioning	Water heater	Insulation	Furnace
\$	\$	\$	\$	\$	\$

***New for 2025* - We also must list the Qualified Manufacturer ID Number for each improvement**

Did you make estimated tax payments in 2025? Include the dates of your payment & amounts separately.

Do you have a financial interest or signature authority on a non-US bank or financial account? YES or NO

In 2025 did you receive or sell, exchange, gift, or dispose of a digital asset/cryptocurrency? YES or NO

Final 2025 paystub

Copy of Taxpayer and Spouse Driver's Licenses (if renewed in 2025 or 2026)

529 Plans

Please provide copy of year-end statement. Many States allow a deduction or credit for contributions made.