

# Checklist – 2025

Required: Name & email \_\_\_\_\_

(For 2024 tax returns)

Required: Phone \_\_\_\_\_

Required: Sign & date \_\_\_\_\_

- Y or N **Required:** Any changes: marital status, address, dependents, phone, email, job description? \_\_\_\_\_
- Y or N **Required:** Did you report ALL income? **CASH WORK**, tips, rental income, hobby, bartering, other? And are all deductions and expenses reported to us accurately?
- Y or N **Required:** In 2024, did you receive, as a reward, or as payment, OR did you sell, dispose of, or exchange any financial interest in any **VIRTUAL CURRENCY** or **nonfungible tokens**? No change in holdings is **NO**.
- Y or N **Required:** In 2024, did you have any financial interest in a **foreign bank or foreign investment account**?
- Y or N **Required:** Do you want **direct deposit** of your refund? We need: name of bank, routing number, account number, and whether it is a checking or savings account (**a copy of a check is preferred**).  
**YES** Circle YES if bank info is same as last year - **BE SURE!** If in doubt, give us a copy of a check.
- Y or N **Required:** Have you created an account on our **Secure Portal**? Even if you cannot scan documents to us, we can easily and securely send them to you, and bill you by **credit card**. Please note that we are expecting **payment of our fee before filing the return**, so plan on making the payment with the efile forms.
- \_\_\_\_\_ NA **Required:** Copy of **Driver's License** if expired last year (**required if a NEW CLIENT**).
- Y or N **Required:** Do you have an **IDENTITY PROTECTION PIN**? We must have it to efile: \_\_\_\_\_
- \_\_\_\_\_ NA **Please write the TOTAL of MONETARY CHARITABLE CONTRIBUTIONS** on the line.
- \_\_\_\_\_ NA Please give us a total for the approximate thrift shop value of **NON-CASH donations**.
- Y or N Did you give a **gift** to anyone **over \$18,000**?
- \_\_\_\_\_ **ALL 1099 and 1098 FORMS** (interest, dividends, stock sales, mortgage interest, etc). Includes **W-2, 1099-R, 1098, 1099-K, 1099-NEC, 1099-Misc, Social Security, K-1, 401(k) distributions, IRA Contributions, HSA Contribution (5498-SA) and distributions, Unemployment, gambling winnings & losses, any other types of income. If an HSA distribution, was it all used on medical?**
- \_\_\_\_\_ NA **Estimated payments** (Federal and state, including **amounts and dates paid**). \_\_\_\_\_
- \_\_\_\_\_ NA **If SELF-EMPLOYED (not W-2 workers)** give us **2024 income and expenses, business miles** and total miles on vehicle for the year, **Office in Home expenses, equipment bought or sold** with date of purchase & cost.
- \_\_\_\_\_ NA Property tax, mortgage interest, home equity interest on primary or second home (not deductible unless spent on the house), points, and **CLOSING STATEMENTS** for **home sale, purchase or refinance**.
- \_\_\_\_\_ NA **SALE OF INVESTMENTS**, including **COST, proceeds, and dates of transactions** (if you received a **1099-B**, you have a sale). Please ask your broker for cost basis if it is not given on the statement.
- \_\_\_\_\_ NA Tuition, books, fees from kindergarten to college (**COLLEGE MUST HAVE 1098-T**); **Student Loan interest**, Section 529 Plans, or Illinois college plan contributions, distributions, or rollovers.
- \_\_\_\_\_ NA **IL TEACHERS (K-12)**: amount spent on classroom supplies & your **IL Teacher License #** \_\_\_\_\_
- \_\_\_\_\_ NA **Totals** for medical expenses (**must exceed 7.5% of income**), including **health insurance premiums (not pre-tax)**, miles, long term care premiums, and **Form 1095-A**, if applicable.
- \_\_\_\_\_ NA **Child care expenses** (includes pre-school & day camp) and **provider's SS # or EIN**, and address.
- \_\_\_\_\_ NA Other: **energy credits** on home, anyone else you support, large **sales tax, electric vehicle** bought.