

Company Logo

# 2025 Tax Preparation Checklist

Documents retrieved from tax years 2021–2024 to help prepare your 2025 U.S. federal income tax return.

Prepared for:

**[Client Name A]**

**[Client Name B]**

Filing Status:

**[Married, Filing Jointly]**

## How to use this checklist:

1. As tax documents arrive by mail or become available online, find them on this list and check the box.
2. Keep each document in a safe place or upload it to your secure tax preparer portal right away.
3. Some items may not apply every year. If you do not receive a form you expected, let your tax professional know.
4. This list is based on information from TaxStatus and may not be complete. Always include any additional tax documents you receive.
5. If you have questions, contact your Advisor or our Tax Planning desk for assistance.



### U.S. Federal Income Tax Deadlines:

- **Filing Deadline:** April 15, 2026
- **Extension Deadline:** October 15, 2026  
(if you intend to file an extension, you must do so by April 15, 2026)

## Household Members

[Client Name A]

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[Client Name B]

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# 2025 Tax Preparation Checklist

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## Documents Prepared for [Client Name A]

### Employment Income

W-2 forms from all employers showing wages, taxes withheld, and benefits

<input type="checkbox"/> XXXXXXX MEDICAL CENTER LLC	Form W-2
<input type="checkbox"/> XXXXXXX MEDICAL SERVICES OF	Form W-2
<input type="checkbox"/> XXXXXXX PHARMA INC	Form W-2
<input type="checkbox"/> XXXXXXX MEDICAL	Form W-2
<input type="checkbox"/> XXXXXXX MEDICAL ASSOCIATES	Form W-2

### Self-Employment & Contract Income

1099-NEC and 1099-MISC forms for freelance, consulting, or contract work

<input type="checkbox"/> XXXXXXX COMMUNITY HOSPITAL Property: Non-Employee Compensation	Form 1099-MISC
<input type="checkbox"/> XXXXXXX COMMUNITY HOSPITAL	Form 1099-NEC Nonemployee Compensation
<input type="checkbox"/> XXXXXXX STATE DEPARTMENT Property: Medical Payments	Form 1099-MISC
<input type="checkbox"/> XXXXXXX CLAIMS MANAGEMENT SERVICES INC	Form 1099-NEC Nonemployee Compensation

### Rental Property Income

1099-MISC forms reporting rental income from properties you own

<input type="checkbox"/> XXXXXXX COUNTY BOARD OF SOCIAL SERVICES Property: Rents	Form 1099-MISC
<input type="checkbox"/> XXXXXXX HOUSING AUTHORITY Property: Rents	Form 1099-MISC
<input type="checkbox"/> XXXXXXX FIRE AND CASUALTY COMPANY Property: Rents	Form 1099-MISC

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# 2025 Tax Preparation Checklist

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## Documents Prepared for [Client Name A]

### Business & Partnership Income

Schedule K-1 forms from partnerships (1065), S-Corps (1120-S), and trusts (1041)

<input type="checkbox"/> XXXXXXX AVENUE LLC	Schedule K-1 1065
<input type="checkbox"/> XXXXXXX PROPERTY PARTNERS LP	Schedule K-1 1065
<input type="checkbox"/> XXXXXXX PROPERTY PREFERRED LP	Schedule K-1 1065
<input type="checkbox"/> XXXXXXX CORP	Schedule K-1 1120
<input type="checkbox"/> XXXXXXX MEDICAL SERVICES	Schedule K-1 1120
<input type="checkbox"/> XXXXXXX MEDICAL SERVICES	Schedule K-1 1120
<input type="checkbox"/> XXXXXXX STAFFING SOLUTIONS	Schedule K-1 1120
<input type="checkbox"/> XXXXXXX REAL ESTATE FUND	Schedule K-1 1065
<input type="checkbox"/> XXXXXXX PHARMA INC	Schedule K-1 1120
<input type="checkbox"/> XXXXXXX YOGA INC	Schedule K-1 1120
<input type="checkbox"/> XXXXXXX MEDICAL	Schedule K-1 1120
<input type="checkbox"/> XXXXXXX MED SERVICES	Schedule K-1 1120
<input type="checkbox"/> XXXXXXX CARE PC	Schedule K-1 1120
<input type="checkbox"/> XXXXXXX LLC	Schedule K-1 1065
<input type="checkbox"/> XXXXXXX MEDICAL ASSOCIATES	Schedule K-1 1120
<input type="checkbox"/> XXXXXXX OFFICER	Schedule K-1 1041
<input type="checkbox"/> XXXXXXX GENERAL CONTRACTORS LLC	Schedule K-1 1065
<input type="checkbox"/> XXXXXXX ART & INVESTMENTS	Schedule K-1 1041
<input type="checkbox"/> XXXXXXX MEDICAL SERVICES	Schedule K-1 1120
<input type="checkbox"/> XXXXXXX NEURO CARE	Schedule K-1 1120

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# 2025 Tax Preparation Checklist

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## Documents Prepared for [Client Name A]

### Investment & Mortgage Accounts

Interest, dividends, capital gains, retirement contributions, and mortgage

**NEW** Digital Asset Reporting (Form 1099-DA)

If you hold cryptocurrency or digital assets, you may receive Form 1099-DA from exchanges or brokers reporting your transactions. Please collect and provide all 1099-DA forms. I have reviewed my crypto/digital asset holdings for 1099-DA forms

<input type="checkbox"/> XXXXXXXX BANK Account: lllx6951	Form 1099-INT
<input type="checkbox"/> XXXXXXXX LOAN SERVICING LLC Account: lllx2784	Form 1099-INT
<input type="checkbox"/> XXXXXXXX FINANCIAL Account: lllx8993	Form 1098
<input type="checkbox"/> XXXXXXXX SERVICING LLC Account: lllx2740	Form 1099-INT
<input type="checkbox"/> XXXXXXXX CLEARING Account: lllx0001	Form 5498 Individual Retirement Arrangement Contribution Information
<input type="checkbox"/> XXXXXXXX LLC Account: lllx4020	Form 1098
<input type="checkbox"/> XXXXXXXX MORTGAGE Account: lllx1374	Form 1098
<input type="checkbox"/> XXXXXXXX MORTGAGE LLC Account: lllx4020	Form 1098
<input type="checkbox"/> XXXXXXXX MORTGAGE Account: lllx3457	Form 1098
<input type="checkbox"/> XXXXXXXX LIFE INS CO Account: lllxY499	Form 1099-INT
<input type="checkbox"/> XXXXXXXX LOAN SERVICING Account: lllx6361	Form 1098
<input type="checkbox"/> XXXXXXXX GEN CONTRAC LLC Account: lllx8391	Form 1099-INT

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# 2025 Tax Preparation Checklist

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## Documents Prepared for [Client Name A]

### Other Income & Transactions

Government payments, property sales, tax refunds, and miscellaneous income

- |   |                |
|---|----------------|
| <input type="checkbox"/> DEPARTMENT OF XXXXXXXX<br>Property: Unemployment Compensation                  | Form 1099-G    |
| <input type="checkbox"/> XXXXXXXX TITLE AGENCY<br>Property: 37A CORTLAND PL TENAFLY, NJ 07670           | Form 1099-S    |
| <input type="checkbox"/> XXXXXXXX DEPT OF REVENUE<br>Property: Prior Year Refund                        | Form 1099-G    |
| <input type="checkbox"/> XXXXXXXX TITLE AGENCY INC.<br>Property: 213 GLEN AVE, PALISADES PARK, NJ 07650 | Form 1099-S    |
| <input type="checkbox"/> STATE OF XXXXXXXX<br>Property: Prior Year Refund                               | Form 1099-G    |
| <input type="checkbox"/> STATE OF XXXXXXXX<br>Property: Prior Year Refund                               | Form 1099-G    |
| <input type="checkbox"/> XXXXXXXX BANK TRUST TAXDEPT<br>Property: Other Income                          | Form 1099-MISC |

### Additional Documents to Consider

- Records of estimated tax payments made during 2025
- Charitable donation receipts and acknowledgment letters
- Medical expense receipts (if itemizing deductions)
- State and local tax payment records
- Documentation for major life events (marriage, birth, home purchase)

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# 2025 Tax Preparation Checklist

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## Documents Prepared for [Client Name B]

### Employment Income

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<input type="checkbox"/> XXXXXXX MEDICAL CENTER LLC	Form W-2
<input type="checkbox"/> XXXXXXX MEDICAL SERVICES OF	Form W-2
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<input type="checkbox"/> XXXXXXX COMMUNITY HOSPITAL	Form 1099-NEC Nonemployee Compensation
<input type="checkbox"/> XXXXXXX STATE DEPARTMENT Property: Medical Payments	Form 1099-MISC
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