

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]	Page 2
[Client Name B]	Page 6

# 2025 Tax Preparation Checklist



## Documents Prepared for [Client Name A]

### Employment Income

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

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

### Self-Employment & Contract Income

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

<input type="checkbox"/> XXXXXXXX COMMUNITY HOSPITAL Property: Non-Employee Compensation	Form 1099-MISC
<input type="checkbox"/> XXXXXXXX COMMUNITY HOSPITAL	Form 1099-NEC Nonemployee Compensation
<input type="checkbox"/> XXXXXXXX STATE DEPARTMENT Property: Medical Payments	Form 1099-MISC
<input type="checkbox"/> XXXXXXXX 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"/> XXXXXXXX COUNTY BOARD OF SOCIAL SERVICES Property: Rents	Form 1099-MISC
<input type="checkbox"/> XXXXXXXX HOUSING AUTHORITY Property: Rents	Form 1099-MISC
<input type="checkbox"/> XXXXXXXX FIRE AND CASUALTY COMPANY Property: Rents	Form 1099-MISC

This checklist is for your convenience and does not constitute tax advice. Please consult your tax advisor regarding your specific situation.

# 2025 Tax Preparation Checklist



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

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# 2025 Tax Preparation Checklist



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

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

### Additional Documents to Consider

<input type="checkbox"/> Records of estimated tax payments made during 2025
<input type="checkbox"/> Charitable donation receipts and acknowledgment letters
<input type="checkbox"/> Medical expense receipts (if itemizing deductions)
<input type="checkbox"/> State and local tax payment records
<input type="checkbox"/> Documentation for major life events (marriage, birth, home purchase)

# 2025 Tax Preparation Checklist



## Documents Prepared for [Client Name B]

### Employment Income

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

<input type="checkbox"/> XXXXXXXX MEDICAL CENTER LLC	Form W-2
<input type="checkbox"/> XXXXXXXX MEDICAL SERVICES OF	Form W-2
<input type="checkbox"/> XXXXXXXX PHARMA INC	Form W-2
<input type="checkbox"/> XXXXXXXX MEDICAL	Form W-2
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<input type="checkbox"/> XXXXXXXX COMMUNITY HOSPITAL	Form 1099-NEC Nonemployee Compensation
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<input type="checkbox"/> XXXXXXXX CLAIMS MANAGEMENT SERVICES INC	Form 1099-NEC Nonemployee Compensation

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