



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]**

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

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

### Self-Employment & Contract Income

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

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

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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"/> XXXXXX BANK	Form 1099-INT
Account: IIIx6951	
<input type="checkbox"/> XXXXXX LOAN SERVICING LLC	Form 1099-INT
Account: IIIx2784	
<input type="checkbox"/> XXXXXX FINANCIAL	Form 1098
Account: IIIx8993	
<input type="checkbox"/> XXXXXX SERVICING LLC	Form 1099-INT
Account: IIIx2740	
<input type="checkbox"/> XXXXXX CLEARING	Form 5498 Individual Retirement Arrangement Contribution Information
Account: IIIx0001	
<input type="checkbox"/> XXXXXX LLC	Form 1098
Account: IIIx4020	
<input type="checkbox"/> XXXXXX MORTGAGE	Form 1098
Account: IIIx1374	
<input type="checkbox"/> XXXXXX MORTGAGE LLC	Form 1098
Account: IIIx4020	
<input type="checkbox"/> XXXXXX MORTGAGE	Form 1098
Account: IIIx3457	
<input type="checkbox"/> XXXXXX LIFE INS CO	Form 1099-INT
Account: IIIxY499	
<input type="checkbox"/> XXXXXX LOAN SERVICING	Form 1098
Account: IIIx6361	
<input type="checkbox"/> XXXXXX GEN CONTRAC LLC	Form 1099-INT
Account: IIIx8391	

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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	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)

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# 2025 Tax Preparation Checklist

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## Documents Prepared for [Client Name B]

### Employment Income

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

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

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