NORMA'S TAX Service & ACCOUNTING

Personal Income Tax 2025 Checklist

This is a checklist of items that may be used in preparing your personal income tax return. Please bring all official tax documents that apply to you. For all other income and expenses, bring totals only.

Personal information required

- ☐ Completed Client Information Forms (Can be obtained in the office OR on our website: normastaxservice.com)
- ☐ Social Security numbers and dates of birth for any new dependents
- ☐ IP PIN letter issued annually from IRS (if you requested or for compromised or stolen identity) - May be obtained from the irs.gov website
- ☐ **Proof of dependent's residency**. Must have 2025 date, dependent name, and your address for all dependents. Examples: 1095A, B or C, grade card or school record, medical records, MO Medicaid, or bank statement

Income

- ☐ W-2 - Wage income for you and your spouse
- ☐ W-2G - Income from gambling, online gaming and sports betting and Win/Loss Statement
- ☐ 1099 NEC - Non-Employee Compensation for Self-Employment income
- ☐ 1099 SSA - Social Security benefits received
- ☐ 1099 INT, 1099 DIV, 1099 B - Investment or interest income
- ☐ 1099 HSA - Health Savings Account distributions and contributions
- ☐ 1099A/1099C - Cancelled debt or abandoned property income
- ☐ 1099B - Sale of Stocks & Investments
- ☐ 1099DA - Block chains of virtual currency, or virtual currency profit reports
- ☐ 1099G - forms for unemployment income, or state or local tax refunds
- ☐ 1099K - income received from Venmo, Square, credit cards or other cash apps
- ☐ 1099Q - 529 education plan distributions and contributions
- ☐ 1099R - Retirement, IRA, and Pension income
- ☐ 1099S - Income from sale of a real estate property
- ☐ K-1 - Income from Partnerships, S-Corporations, Trusts, or Estates
- ☐ Alimony received and date of divorce OR date of modification
- ☐ Self-Employment, Rental or Farm Income totaled by category of income and expenses. Please complete the REQUIRED Norma's Client Information Form B-1. This can be obtained in the office or on our website.

Deductions and credits

- ☐ Form 1095A - REQUIRED if you had healthcare.gov or marketplace health insurance
- ☐ Form 1095B - 1095C (not required but helpful for dependency verification)
- ☐ Form 1098E - Student loan interest paid
- ☐ Form 1098T - Tuition paid - this form is REQUIRED for a tuition credit
- ☐ Forms 1098 - Mortgage interest, private mortgage insurance (PMI) on main or 2^{nd} homes
- ☐ 1098 VLI – Vehicle Loan Interest Statement
- ☐ For Educators: totals for expenses paid for classroom supplies, PPE, etc. (max deduction is $300)
- ☐ Records of IRA contributions made this year
- ☐ Records of Medical/Health Savings Account (MSA/HSA) contributions not reported on W-2
- ☐ Out of Pocket Health insurance premium totals (do not include if paid for or withheld by employer)
- ☐ Alimony paid and date of divorce OR date of modification
- ☐ Child care costs - provider's name, address, tax ID, and amount paid
- ☐ Qualified charitable donation receipts with amounts or value of donated property & mileage
- ☐ Qualified Charitable Donation through your IRA – if over age 72
- ☐ Medical & dental expense totals - amount paid out of pocket for health insurance, mileage

Taxes you've paid

- ☐ Federal and state estimated tax pre-payment amounts and dates paid
- ☐ Real estate and/or personal property tax paid receipt