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Helping you Prepare for Your Income Tax Processing For Tax Year 2025 (*taxes processed in 2026*)

➤ Checklist of Tax Documents You Must Bring Us

INCOME EARNED – forms needed:

- ➔ **Wages/earnings from employment:** W-2 forms; 1099-NEC forms; 1099-K forms.
- ➔ **Did you receive overtime pay in 2025?** If yes, bring in a copy of your last paystub for the year.
- ➔ **Retirement income:** 1099-R forms (show pension, IRA, annuity drawing).
- ➔ **Social Security Benefit Drawing:** SSA-1099.
- ➔ **Investment income forms:** Interest earned 1099-INT); income from dividends/stock sales (bring us statements from your investment company); crypto-currency (if you owned/sold this, inform us of this activity and the transaction amounts as this activity needs to be reported to the IRS).
- ➔ **Other income and losses:** 1099-MISC forms for prizes won, royalty payments, and rental income (also provide expenses), and W-2G forms for gaming winnings
- ➔ **Income from other sources:** Bring us documents that supports this income.

EXPENSES – written information needed:

- ➔ **Estimated quarterly tax payments:** We need a sheet showing payment date and amount (made in 2025 and early Jan. 2026 for anticipated tax liability for Tax Year 2025).
- ➔ **Daycare expense:** Amount for each child; provider's name, address, and SSN or EIN.
- ➔ **Education expense:** 1098-E-interest paid on student loans; 1098-T-tuition/expenses.
- ➔ **Teachers - classroom expenses:** Educators in grades K-12 qualify for a deduction up to \$300 for non-reimbursed goods.
- ➔ **Charitable donations:** Submit receipts or amounts (must itemize to claim this). *See our website for Tax Year 2026 changes (for returns filed in 2027).*
- ➔ **Health insurance purchased through the MarketPlace (Affordable Care Act):** Form 1095-A.

➤ How to Submit Your Tax Documents to Us



When submitting your, we prefer that you either:

- 1) bring documents to our office;
- 2) upload your documents to ICFiles, our secure file-sharing online portal.

We prefer either of these methods rather than you emailing us your documents because we receive a high volume of emails every day, and emailing your documents could result in a delay in the processing of your return.

If you are not already using ICFiles and want to learn more about it, please visit our website (www.eaton-cpa.com) and click on Client Portal (ICFiles) from the top menu.

➤ Checklist of Tax Documents (cont'd.)

OTHER ITEMS:

- ➔ **Health Savings Account (HSA):** Form 5498-SA (contributions); 1099-SA (distributions).
- ➔ **IP PIN:** If you set up extra security with the IRS for tax filing, you will receive a letter from the IRS informing you of your new PIN (in January 2026).
- ➔ **IRA Contributions in 2025:** If there were any for yourself or your spouse, provide this information on each person:
 - Roth amount
 - Tradition IRA amount
 - SEP, Keogh, Simple IRA amount
- ➔ **New dependents in your household in 2025:** If there were any, we need their full name, gender, date of birth, and SSN.

You may complete the following 2 pages and bring in as well.

Client and Tax Information: Tax Year 2025 (for taxes prepared in 2026)

Please be sure to update the Personal / Contact Information section below.

- Personal | Contact Information:

Client Information

Taxpayer Name (required):		Name of Spouse (required):
Social Security Number:		Social Security Number:
Birthdate:		Birthdate:
Occupation:		Occupation:
Email:		Email:
Cell Phone (we use as primary contact):		Cell Phone (we use as secondary contact):
Work Phone:		Work Phone:
Home Phone:	Home Address:	

Dependent Information (all sections must be completed):

Full Name of Dependent	Son/Daughter	Social Security Number	Date of Birth

- Child Care (all sections must be completed):

Provider Name:	Address:
Social Security Number or FEIN (one must be provided):	Amount Paid (annually):
Provider Name:	Address:
Social Security Number or FEIN (one must be provided):	Amount Paid (annually):

- Tuition and Related Expenses:

For any household member incurring tuition and related expenses, submit Form 1098-T – Tuition Statement in addition to a summary of expenses paid for books, supplies, and equipment for post-secondary education.

Name of Student	Year in College (indicate 1 2 3 4)	Tuition (annual)

- Did you receive OVERTIME pay in 2025?

If so, you may qualify for a tax deduction. **Please bring in a copy of your last paystub for the year.**

- Charitable Donations:

Charitable donations – cash:

Charitable donations – non-cash:

- Itemized Deductions (you can only itemize if your deduction amounts listed below total MORE THAN your standard deduction amount:

Contributions:

Non-cash contributions:

Medical:

Medical insurance premiums:	Medicine and prescription drug expenses:
Hospital and clinic expenses:	Dental expenses:
Optician and eyeglass expenses:	All other medical expenses:
Miles driven to obtain medical care (annually):	

Taxes:

Sales tax on vehicles (cars, motorcycles, etc.):	State income tax:
Real estate taxes:	

Home Mortgage Interest:

Amount:

- IRA Contributions:

Did you make contribution(s) to an IRA: ☐ Yes ☐ No **If “yes”, please complete those areas that apply.**

Taxpayer:	Spouse:
Roth IRA amount:	Roth IRA amount:
Traditional IRA amount:	Traditional IRA amount:
SEP, Keogh, or SIMPLE amount:	SEP, Keogh, or SIMPLE amount:

- Estimated Tax Payments for the upcoming Tax Year 2025 income tax return - did you make any?

☐ No ☐ Yes (if “yes”, indicate below)

(would have been made in 2025 and in Jan. 2026 – possibly quarterly, using vouchers)

When you would have made the payments:	FEDERAL PAYMENT \$ AMOUNT:	STATE PAYMENT \$ AMOUNT:
April 2025		
June 2025		
September 2025		
December 2025 (payment made BEFORE 12/31/2025)		
January 2026 (payment made AFTER 12/31/2025)		

- Did you (for any months during 2025) have health insurance coverage through the Marketplace (aka the Affordable Care Act)?

☐ Yes ☐ No **If “yes”, you must provide us with your 1095-A form (you received in the mail). If you don’t have it, log into your account at www.healthcare.gov (where you possibly purchased your coverage) or call the Marketplace at 1-800-318-2596 to request a copy of your form.**

- Income other than W-2’s, which you have provided us:

You must provide any other forms that show income amounts so we can accurately prepare your tax return.