



2025-2026 Tax Checklist

Please use this checklist to guide you in gathering your information

New Clients

- Copies of your 2023 & 2024 Income Tax Return(s) - **include all pages**
- All family member's legal names and preferred names, SSNs, dates of birth
- Your current mailing address, and contact number
- Please also send a copy of your Driver's License or other identification

All Clients

To expedite processing time, we ask that all clients [**complete our annual questionnaire here.**](#)

Personal Tax Information and Documents

- W-2s & 1099 Income Forms (Int, Div, B, D, C, R, G, SSA, MISC, NEC)
 - Wages, self-employment income, investment earnings, social security income, retirement distributions, unemployment income etc.
- 1098 (mortgage interest)
- Details on any employee stock benefits
 - Vesting schedule and current year details, Form 3922, sell to cover information, or any other statements you have showing stock activity
- K-1 Income forms from S-Corp, partnership, estates or trusts - **include all pages**
- Home and Rental Sales and Purchases:
 - Copy of signed, final settlement statement.
 - Form 1099-SA, if received
- College Costs
 - Form 1098-T - tuition paid to your school or your child's school
 - Form 1098-E - student loan interest

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- Non-tuition out of pocket expenses or distributions from 529 or other tax qualified education plans

- Child Care Costs
 - Legal name, address, and tax identification number (EIN or SSN) of each childcare provider. We do not need an EIN or SSN if the provider was a government entity
 - Total costs broken down **by provider**
 - If multiple children received care, we also need the cost additionally broken down **by child**
- Additional Documentation Required for Claiming Dependents
 - At least one document such as school records, Indigenous tribal statement, healthcare records, landlord or property management statement showing that the child lived at your address
- HSA Distributions and Contributions
 - Is it a family or solo plan?
 - Are contributions deducted from your paycheck pre-tax?
- 1095-A if you bought insurance through a health exchange
 - WA: Not required if you are receiving AppleCare
- **NEW** 1099-DA “Digital Asset Proceeds From Broker Transactions”
 - These forms report taxable activity related to virtual currencies and are newly required.
- **NEW** 1098-VLI
 - If you purchased a qualifying vehicle with a qualifying loan this form may be issued to you to report potentially deductible loan interest

Business and Rental Tax Information and Documents

- Long Term Rental Income and Expenses (Per Rental Address)
 - Mortgage, utilities, repairs, taxes, HOA dues etc.
- Short Term Rental Income and Expense (Vacation rental / Airbnb)
 - Same as above plus total days rented, total personal use days, average length of stay (Time spent at property for repairs or improvements are not personal use days)



- Did you provide any add on services such as daily breakfast or daily cleaning?
(Cleaning between stays isn't an add on service)

- Business Expenses
 - If you use QB Online, ensure we have access please **invite Erin Louis, erin@advocate-accounting.com as an accountant user**
 - If you use QB Desktop, send P&L detail and balance sheet detail for 2025 and summary reports for 2024
 - If you do not use accounting software, please send data in Word or Excel
 - **Please aggregate expenses by type: supplies, advertising, etc.**
 - **Please do not send receipts unless we request them**
- Auto Expenses and Detail
 - Year, make, model and cost of vehicle when you began using for business
 - Total mileage and total business mileage
- Home Office
 - Square footage of home office and total home square footage
 - Expenses such as utilities, rent, insurance, mortgage
- 2025 Income Estimates - what do you estimate your 2025 business income to be?

For S-Corp Owners:

- Distributions
- 12/31/25 Corporate bank balance and debt balance