

# BRIGHT FUTURE

## FINANCIAL SERVICES

### Tax Year 2025 Checklist

#### INCOME

W-2 Wage/Salaries/Tips	_____
1099-INT Interest	_____
1099-DIV Dividends	_____
1099-MISC Self-Employment	_____
1099-R Pension, IRA, Rollover	_____
W-2G Gambling, Lottery	_____
1099-C Cancellation of Debt	_____
1099-G Unemployment	_____
1099-G State/City Tax Refund	_____
1099-B Capital Gains/Losses	_____
1099-S Property Sale	_____
1099-Q Education (529 Plan)	_____
1099-SA HSA Disbursement	_____
K-1 for	_____
Partnerships	_____
S-Corporation	_____
Trust	_____
Estate	_____
SSA-1099 Social Security	_____
RRB-1099 Railroad Retirement	_____
Alimony Paid	_____
(only if divorce final before 1/1/2020)	_____
Rental Real Estate	_____
Scholarships/Fellowships	_____
Jury Duty	_____
Tax Exempt Interest	_____
Property Tax Rebate Recovery	_____
Foreign Earned Income	_____
Homebuyer Credit Recovery	_____
Gig Work (Airbnb, Uber, Taskrabbit, etc)	_____
OTHER INCOME	_____

#### DEDUCTIONS/CREDITS/TAXES

1098-E: Student Loan Interest	_____
1098-T: College Tuition/Fees/Books	_____
New Car Loan Interest	_____

#### DEDUCTIONS/CREDITS/TAXES

1095-A: Health Ins. Reporting	_____
Childcare/Day Camp Expenses (child <13) (We need provider's name, address, and tax ID number)	_____
Household Employers (Nanny Tax)	_____
IRA/SEP/SIMPLE Contributions	_____
Roth IRA Contributions or Conversion	_____
Teacher's Classroom Expenses	_____
HSA Contributions	_____
Adoption Expenses	_____
Self-Employed Health Insurance Premiums	_____
Retirement Saver's Credit	_____

#### ITEMIZED DEDUCTIONS

##### **Medical, Dental, Optical**

(Medical total must exceed 7.5% of income to be deductible)

Prescription Drugs	_____
Health Insurance Premiums (you paid)	_____
Long Term Care Insurance	_____
Number of Medical Miles	_____
Doctor, Dental, Hospital and Lab Fees	_____
Vision, Eyeglasses and Contacts	_____
Nursing Home Care	_____
Special Needs Education	_____
Taxes Paid	_____
Sales Tax (cars, boats, RVs)	_____
Primary Residence Prop Taxes	_____
Other Property Taxes (land, second home)	_____
Auto License Plate Registration	_____
Home Mortgage Interest (Form 1098)	_____
Home Equity Loans (Form 1098)	_____
Investment Loans	_____
Mortgage Insurance Premiums	_____

#### CONTRIBUTIONS

Cash, Check, and Payroll Deductions	_____
(Each donation of \$250+ needs written acknowledgement from charity)	_____
Goods Donated	_____
(If over \$500, you must have a list of donated items, charity address, and date of donation. If over \$5,000, you need appraisal)	_____
Volunteer Expenses/Mileage	_____