

# BRIGHT FUTURE

## FINANCIAL SERVICES

### Tax Year 2025 Checklist

#### INCOME

W-2 Wage/Salaries/Tips  
 Overtime  
 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