



Main: 623.240.9545 | Toll-Free Fax: 866.779.5210 | Email: info@jeffersonfranklintax.com

Income Tax Checklist

To help your appointment go smoothly, please bring these items with you. Please note this list is not all inclusive and upon interview we may find more information is needed to properly service you:

REFERENCE

[] A copy of last year's tax return(ONLY if you are a new client OR did not have last year's return prepared and filed by us)

INCOME

[] All W-2's, 1099's and any statements of income(i.e. Excel Sheets | Check Register | P&L Statement

[] Rental Properties - Rents Received

[] Royalties- for intellectual property, resources(i.e. oil/mineral/mining), etc.

[] All retirement distributions(401k, IRA, etc.)

[] All year-end investment statements - INTEREST INCOME, DIVIDENDS & STOCK TRADES

[] Amount of state refund from previous year(only if you itemized your deductions)

[] Alimony received

[] Unemployment earnings

DEDUCTIONS

[] Tips(up to \$25k) ***New for 2025

[] Overtime(up to \$12.5k for Single/\$25k for MFJ) ***New for 2025

[] Car Loan Interest(up to \$10k only for loans on NEW vehicles assembled in the US originating after 12/31/24) ***New for 2025

[] Senior Deduction(up to \$6k – for individuals born prior to 1/2/61) ***New for 2025

[] Retirement Savings Contributions(i.e. traditional IRA, SEP, SIMPLE)

[] Mortgage Interest + Points + Private Mortgage Insurance

[] Gambling(losses or extent of winnings)

[] Sale of stock and purchase price documentation

[] Contribution to IRA's

[] Taxes owed, paid or received in current tax year

[] Alimony paid(only for divorces finalized PRIOR to 12/31/18)

[] Moving expenses if over 50 miles(**military ONLY**)

[] Prescriptions and medicine receipts

[] Medical and dental insurance, this includes health and disability

[] Expenses for the doctor, dentist, nurse, etc.

[] Hospitals and clinics- including medically supervised diet programs

[] Lab and X-Ray fees

[] Medical supplies and special medical equipment

[] Transportation to the doctor's or pharmacy for prescriptions(mileage)

[] Property taxes in home or owned land whether it's itemized or not

[] New vehicle purchase statement and sales tax paid:

Your Taxes = Planned. Prepared. Solved!

15199 W. Jackson St., Goodyear, AZ 85338 | Main: 623.240.9545 | Fax: 866.779.5210

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- Cash/Check contributions
- Non-Cash Contributions: Goodwill, Deseret Industries, Salvation Army, etc.
- Major casualty of theft/loss(must be >10% of gross income, not reimbursed by insurance & in Federally declared disaster area)
- Automobile Registration Fees(**only in states where registration fee is based on vehicle value**)

OTHER DEDUCTIONS(Only for Self Employed or 1099 contractors)

- Amounts paid in current year for tax preparation
- Union or Professional dues as well as related magazine and journal subscriptions
- Un-reimbursed employee business expenses: Lodging, meals, gas, supplies, etc.
- Work Mileage(only for locations other than primary place of employment)
- Job-seeking expenses: Job-related publications, work related phone, mileage, resumes, postage copies, etc.
- Tools and equipment(depreciable), safety and protective equipment, uniforms(cost and cleaning), vocational supplies
- Cell phone, landline for fax, internet access fees, travel expenses, advertising, insurance, etc.
- Other Expenses for your own small business

CREDITS

- Childcare expenses(ONLY for children under 13 at end of tax year)
 - Childcare Provider's name and social security number or business ID as well as amount paid to each provider
- Tuition and fees paid(for yourself or someone else)
 - Colleges, trade schools, tuition, books and required supplies
- Energy improvements to household- Solar(must be installed BY 12/31/25), Insulation, Doors, Windows ***New for 2025
- Qualified Adoption Expenses
- Qualified Electric Vehicle Purchase(subject to restrictions on vehicles purchased BEFORE 9/30/25) ***New for 2025