



## 2024-2025 Tax Checklist

*Please use this checklist to guide you in gathering your information*

### New Clients

- Copies of your 2022 & 2023 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
  - Non-tuition out of pocket expenses or distributions from 529 or other tax qualified education plans

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- 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?
- 1095-A if you bought insurance through a health exchange
  - WA: Not required if you are receiving AppleCare

## 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](mailto:erin@advocate-accounting.com) as an accountant user**
  - If you use QB Desktop, send P&L detail and balance sheet detail for 2024 and summary reports for 2023
  - 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 the



- 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
- 12/31/24 Corporate bank balance and debt balance