



# TAX PREPARATION CHECKLIST FOR 2025

**TAXPAYER'S NAME:** \_\_\_\_\_ **SPOUSE'S NAME:** \_\_\_\_\_

*Please make sure to answer these questions **BEFORE** your appointment and bring this (and any supporting documents) to your appointment. If you are unsure about any of these questions, please ask us!*

*Hagen CPA, LLC is not responsible for any interest and/or penalties that you incur if you pay after April 15<sup>th</sup>.*

## **2025 CHANGES**

YES NO


1. Were you legally married as of December 31, 2025?
2. Are there changes to who you may claim as dependents for 2025? (If yes, please attach proof of residency or Form 8332)

*Please list the name(s),  
SSN(s), & DOB(s) of  
child(ren) or dependent(s)  
you are claiming for 2025:*

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**2a.** Would you like us to process Form 4547, Trump Account Election, for any qualifying child born in 2025? *(Not available until July 2026, additional fee may apply)*

**2b.** Did each dependent stay overnight more than 50% of 2025?

3. Did you provide more than 50% of the support for your household in 2025?
4. Did you have adoption expenses in 2025 for which you are claiming the Adoption credit, and do you want to check if you are eligible for the refundable portion?
5. Did you move or have a change of address in 2025?
6. Did you purchase, sell, or refinance during 2025? *(If yes, please attach Home Sale/Closing Information)*
7. Did you earn income in a state other than the state you live in?
8. Did you receive any notices from the IRS or the state taxing agency? *(If yes, please attach)*  
Was any of your income in 2025 on Form W-2 attributed to overtime or tips? *(If yes, please provide a copy of your final paystub and a letter from your employer, if available, to determine the eligibility for the overtime/tip deduction or sign the Hagen CPA Tip/Overtime Disclosure)*
10. Did you receive any type of prize, award, or gambling winnings? *(If yes, please attach W-2G or other casino statement)*
11. Did you receive jury duty or alimony pay? *(If yes, please attach proof)*
12. Did you have any financial interest or had any transactions in any digital assets?
13. Did you give any gifts to any one person in 2025 more than \$19,000?
14. Did you pay wages to any household employees *(such as a nanny)*?
15. Did you have any debts forgiven or cancelled in 2025?
16. Did you pay any college tuition during 2025? *(If yes, please attach form 1098-T)*

*How much was paid for any additional out-of-pocket expenses (books, fees, etc.)? \$*

17. Did you pay any private school tuition cost for Grades K -12? *(If yes, please attach documentation from the school)*
18. Did you pay any student loan interest? *(If yes, please attach 1098-E)*
19. Did you make any contributions/deductions to any college savings plan? *(If yes, please attach documentation)*
20. Did your employer provide any educational assistance, including student loan payments, in 2025?
21. Do you have any home equity loans where any proceeds were not used to improve your residence?
22. Did you have car loan interest from a purchased new personal car in 2025 that had final assembly in America and weighed under 14,000 pounds? *(If yes, please provide amount and Form 1098-VLI from your lender)*
23. Did you have any foreign assets during the year?
24. Did you make any purchases in 2025 from out-of-state companies that did not charge sales tax?

If yes, please provide the amount of purchases subject to your state's Use Tax: \$


25. Are you expecting any significant changes to 2025's income, deductions, or credits?

26. Do you have an identity protection PIN used to file your return due to identity theft? *(If yes, please attach documentation)*

27. Did you make any federal or state estimated tax payments? *(If yes, please attach documentation)*

28. Did you make improvements to your home that may qualify for Energy credits? *(If yes, please attach documentation)*

29. Did you make any contributions to a retirement plan? *(If yes, please attach documentation)*



YES NO

<input type="checkbox"/>	<input type="checkbox"/>
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30. Did you make any charitable contributions in 2025?

If yes, please provide the amounts of: **Cash:** \$ \_\_\_\_\_ **Non-Cash:** \$ \_\_\_\_\_ **QCD:** \$ \_\_\_\_\_

<input type="checkbox"/>	<input type="checkbox"/>
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31. Did you purchase a qualified plug-in electric vehicle or fuel cell vehicle **before** September 30, 2025? (If yes, please attach statement from seller)

<input type="checkbox"/>	<input type="checkbox"/>
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32. Did you pay any rent for housing?

Rent per Month: \$ \_\_\_\_\_ #ofmonths? \_\_\_\_\_ Was heat included?  yes  no

<input type="checkbox"/>	<input type="checkbox"/>
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33. Did you make any contributions/deductions to an HSA? (If yes, please attach Form 1099-SA or Form 8889)

<input type="checkbox"/>	<input type="checkbox"/>
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34. Did you purchase your health insurance coverage from the ACA Marketplace? (If yes, please attach form 1095-A)

<input type="checkbox"/>	<input type="checkbox"/>
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35. Did you pay for any health insurance premiums out-of-pocket? \$ \_\_\_\_\_

<input type="checkbox"/>	<input type="checkbox"/>
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36. Did you have any unreimbursed classroom expenses during 2025? (If yes, please provide receipts) \$ \_\_\_\_\_

<input type="checkbox"/>	<input type="checkbox"/>
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37. Did you pay any local property taxes on vehicles?

State? \$ \_\_\_\_\_  County? \$ \_\_\_\_\_

## **BUSINESS AND RENTAL QUESTIONS**

(skip this section if not applicable, or if business is a Partnership or Corporation)

YES NO

<input type="checkbox"/>	<input type="checkbox"/>
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1. Did you start a new business or purchase any rental property during 2025?
2. Did you purchase (or begin using) any assets for your business costing more than \$2,500?
3. Did you sell (or stop using) any assets for your business?
4. Did you make any business payments that require you to issue 1099s? (\$600 threshold; not needed for rentals)

If yes, have you filed all 1099s?  yes  no

<input type="checkbox"/>	<input type="checkbox"/>
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6. Do you have all the documentation to support all business expenses? (If yes, please attach Schedule C)
7. Do you have all the documentation to support all rental expenses? (If yes, please attach Schedule E)
8. Did you spend 250 or more hours of rental service activity? (If yes, please attach log)
9. Do you have a log for business mileage? (If yes, please attach log)
10. FinCen Requirements: Did your LLC Members or Business have a change in address or Members?

If yes, it is recommended to update with FinCen

## **REFUND/BALANCE DUE**

(Paper checks for balances due and/or refunds are no longer an option; if you do not have payments electronically withdrawn, you are responsible for remembering to make any payments on time online – please see <https://www.hagen-cpa.com/irs-to-phase-out-paper-checks> for more information)

If you are due to receive a refund or have a balance due, please provide your banking information below.

**BANK NAME:** \_\_\_\_\_

**ACCOUNT NUMBER:** \_\_\_\_\_

**ROUTING NUMBER:** \_\_\_\_\_

Is this a Savings or Checking Account?  Checking  Savings

## **DRIVER'S LICENSE INFORMATION**

**TAXPAYER:** STATE: \_\_\_\_\_ LICENSE #: \_\_\_\_\_  
 ISSUE DATE: \_\_\_\_\_ EXP. DATE: \_\_\_\_\_

**SPOUSE:** STATE: \_\_\_\_\_ LICENSE #: \_\_\_\_\_  
 ISSUE DATE: \_\_\_\_\_ EXP. DATE: \_\_\_\_\_



## **SIGNING & DELIVERY**

**CHECK YOUR PREFERRED METHOD FOR SIGNING YOUR TAX RETURN**

- Sign Electronically*
- Sign in the Janesville Office*
- Sign in the Evansville Office*

**CHECK YOUR PREFERRED METHOD FOR TAX RETURN DELIVERY**

- Mail*
- Portal Upload*
- Pick-Up Paper Copy at Janesville Office*
- Pick-Up Paper Copy at Evansville Office*

*If signing electronically, please provide your e-mail address(es).*

**TAXPAYER E-MAIL:** \_\_\_\_\_

**SPOUSE E-MAIL:** \_\_\_\_\_

*By signing below, I certify all information provided on and in connection with this form is true and correct to the best of my knowledge. If any information provided is incomplete, inaccurate, misleading, or false, I may be subject to tax filing delays, tax audits, or legal action.*

**TAXPAYER SIGNATURE:** \_\_\_\_\_

**SPOUSE SIGNATURE:** \_\_\_\_\_