Barbara Akins
certified public accountant
relationships. service. integrity

New Tax Client 2025 Checklist

Welcome!

We are excited to have you as a client and to begin building a trusted and valued relationship with you. We hope to make your 1st appointment with us as thorough as possible, so we are sure that we are preparing the *best quality* tax return possible. Please use this questionnaire as a guide to help get your information organized prior to your appointment, or to spark any questions you may have for us.

Filing Status, Children, Other Dependents

____ I got married or divorced this year.
- Let us know if your names changed. We must file with the name Social Security has.
- Do you receive or pay alimony? (not child support).

____ This year I had a baby or adopted a child.
- Child's Date of Birth: ____________________________________
- Child's Social Security Number: ____________________

____ I had a child (that I claim as a dependent) in college this year.
- Bring Form 1098-T. (Go to the students' online login with their college to get this form.)
- If your child is in their first 4 years of school, provide any costs of textbooks & equipment purchased for their use with college.
- If you withdrew from a 529 College Savings Account, bring Form 1099-Q.
- Let us know if your child is a graduate student with a stipend for research.

____ I paid Daycare or Summer Childcare Expenses.
- We will need the Name, Address, & Tax ID number of the provider.

Income - General

____ I received wages this year. Bring Form W-2.

____ I received overtime wages this year. Bring your last pay stub.

____ I expect to receive a K-1 form from a Partnership, Estate/Trust, or S- Corporation.

____ I received gambling winnings this year. Bring tax Form W-2G for winnings along with any losses.

____ I have a bank account that earned more than $10 in interest. Bring 1099-INT forms.

____ I have a non-retirement mutual fund or brokerage account. Bring 1099-DIV forms.

____ I sold stock, bonds, or mutual funds. Bring Form 1099-B.

____ I received unemployment compensation. Bring Form 1099-G.

____ I had a debt cancelled (mortgage, bank loan, credit card company). Bring Form 1099-C.

484.321.3839 • www.AkinsAccounting.com • 835 Rt. 100 North • Bechtelsville, PA 19505

Income – Retirement

____ I receive Social Security Benefits. Bring Form SSA-1099.

____ I made a withdrawal and/or rolled over money from a 401k or pension plan. Bring Form 1099-R.

____ I opened or contributed to an IRA or a ROTH. Dollar Amount: ________ Year Credited: __________

Homeowners' Deductions

____ I moved this year. Bring your settlement sheet(s).

____ I paid real estate taxes. Bring amounts paid.

- *Older PA resident who file for the Property Tax Rebate, bring receipted copies of your tax bills.*

____ I have a mortgage or home equity loan on my home. Bring Form 1098.

- Was your home equity loan used entirely to improve your main home?

____ I refinanced a mortgage this year. Bring your settlement sheet.

Medical

____ I had insurance through the Marketplace for any portion of the year. Bring Form 1095-A.

____ I have large amounts of medical expenses and insurance premiums for the year.

- Give us totals for insurance, doctors/dental visits, and prescriptions if you believe they amount to more than 7.5% of your adjusted gross income. Keep receipts for your records.

Miscellaneous Deductions & Questions

____ I paid estimated taxes to the IRS, State, or Local. List amounts & dates paid.

____ I purchased and financed a new auto that was final assembled in the United States this year. Bring total interest paid for the year and vehicle VIN number.

____ I made charitable contributions by cash or check. Provide totals, we do not need to see your receipts.

____ I made donations of clothing or other items to a charity. If claiming more than $500, we will need:

  - Date(s) of donations / Name & Location of the charity / Description of items donated / $ value of your donations at the time they were donated

- **Write your estimated value on the receipt. We are not able to assign values for you.**
- *If a single, non-cash donation is greater than $250, the IRS requires there be a receipt to be claimed on your return. We do not need to see your receipt but keep for your tax records.*

____ I made donations to a 529 College Savings Plan for someone. We need the beneficiary's name, social security number, & amount contributed during the year.

____ I have a PIN number from the IRS. Bring the PIN number letter that you received from the IRS for 2025. Also bring the PIN number letter for your spouse/dependents if they receive a letter.

____ Bring a copy of last year's tax return.

484.321.3839 • www.AkinsAccounting.com • 835 Rt. 100 North • Bechtelsville, PA 19505

Self-Employment Income & Expenses

____ I am self-employed and/or received Form 1099-NEC. Provide your total gross income received.

Provide any of the following applicable expenses for your business. We do not need to see all of your receipts but need to know totals of certain categories. Every business keeps their records differently, so please bring what you feel is best.

Common expenses include:

- Any purchases of inventory
- Advertising
- Commissions/fees
- Contract labor
- Insurance
- Interest Paid on business loans
- Legal and Professional Services
- Office Expenses
- Rents or Leases
- Equipment Rentals
- Repairs & Maintenance
- Supplies
- Licenses
- Travel (such as seminars, hotels, airfare, etc.)
- Meals (must be ordinary, necessary, and non-extravagant to be deductible)
- Utilities
- Wages to Employees
- Cell Phone & Internet
- Business Mileage or actual expenses of gas, repairs, etc.
- Large purchases that are not used for resale, please bring a copy of the receipt or invoice (it might need to be depreciated

____ Do you have a home office space used regularly & exclusively for your business OR do you work from home? <u>It cannot be a combined space (Example: a desk in the corner of the kitchen).</u>

- Square footage of the office space: __________Square footage of the whole home: __________
- Is this space in the basement or garage? SF of the whole basement or garage: _________
- Homeowners Insurance Paid: ___________
- Any utilities for your home (Water, Sewer, Trash, Electric). ______________
- Were any repairs or major repairs made in or around your home? ________________________

Rental Properties

____ I own a property that I rent out (residential, commercial, vacation home).

____ Include any applicable expenses relating to your rental property. Common expenses are:

- Advertising
- Mileage to/from property, for repairs, etc.
- Cleaning & Maintenance
- Management Company Fees
- Insurance
- Legal or Professional Fees
- Mortgage interest (Form 1098)
- Bring invoices for large purchases for appliances & renovations.
- Repairs
- Supplies
- Taxes
- Utilities
- HOA Fees
- Rental License/Permits

484.321.3839 • www.AkinsAccounting.com • 835 Rt. 100 North • Bechtelsville, PA 19505