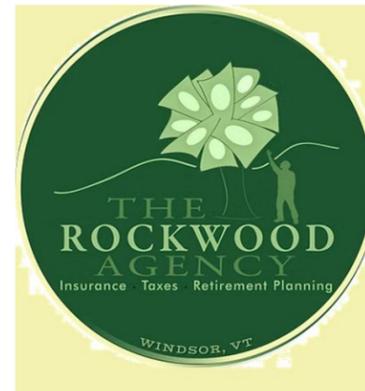


2025 TAX FORM CHECKLIST



POTENTIAL FORMS, DEDUCTIONS & CREDITS TAX FORM CHECKLIST

Income Info:

Income from Jobs (W-2's)

Investment income

Any 1099 or 1098 Forms

Income from State and Local Income Tax Refunds

Alimony Received

VT only – Child Support Received

Business or Farming Income*

IRA/Pension Distributions (1099-R Form)

Rental Property Income*

Unemployment Income (1099-G Form)

Social Security Benefits (1099-SSA Form)

Income from Sales of Property (1099-S or otherwise)

1095 Health Ins. Reporting

Foreign Bank Accts./Foreign Income

Gambling Winnings

Jury Duty

VA Income

Life Insurance Proceeds

Bartering Income

Cash

Adjustments to your Income:

IRA Contributions

Student Loan Interest

Medical Savings Account Contributions

Moving Expenses For A Job (More than 50 Miles)

Contributions to Keogh, SEP, SIMPLE and Other Self-Employed Pension Plans

Itemized Tax Deductions and Credits:

Advance Child Tax Credit Payment

Childcare Costs

Education Costs (1098-T Form, Books & Supplies)

Adoption Costs

Mortgage Interest You Paid

Charitable Donations

Casualty and Theft Losses

Sales Tax and Fee Deductions for New Vehicle Purchases

HUD Statement if Property was Purchased.

Medical and Dental Expenses

Energy-Efficient Home Improvement

Gambling Losses

Taxes You Have Paid:

State and Local Income Taxes

State and Local Sales Taxes

Real Estate Taxes

Personal Property Taxes

Large Purchases Made Out Of State

Educator Expenses

VT Only- Child Support Paid/
Alimony Paid Health Savings Account (HSA 1099-SA)