

Tax Information Checklist

- ☐ Any changes in marital status or changing of your name
- ☐ Have you moved during the year or changed your address
- ☐ Dependent children, addition of newborns or children claiming themselves since they graduated from high school or college
- ☐ If you had any child care or preschool costs please list the amount paid to each provider for each child, the providers name, address, and Federal EIN Number or Social Security Number
- ☐ Do you have a child attending college, provide form 1098-T, book receipts, and billing transcripts by the college
- ☐ Are you making payments on Student Loans, provide form 1098-E
- ☐ Have you made a contribution to a College Savings Plan during the year
- ☐ Have you made a contribution to a Trump Savings Plan during the year
- ☐ Have you made a contribution to your Traditional or Roth IRA during the year
- ☐ Did you receive a distribution from a retirement account or annuity during the year. Have you completed a rollover or converted any IRA's to Roth IRA's during the year. If so, provide form 1099-R
- ☐ Have you purchased, sold, or refinanced a home or a second home
- ☐ At any time during the year was your personal home rented or used for business purposes
- ☐ Have you received any assets through inheritance. You may be eligible for a stepped-up basis
- ☐ Did you receive or make a gift during the year
- ☐ Did you receive any other income that is not reported on a W-2, 1099, or any other tax reporting document which is not included in your business or farm income
- ☐ Are you able to itemize, complete the itemized deduction worksheet to determine if your out of pocket medical expenses, real estate taxes, state income taxes, motor vehicle taxes, house mortgage interest, investment interest, donations, and other itemized deductions exceed the standard deduction for the year. Please provide copies of sales tax receipts on large item purchases such as a vehicle purchase or ATV
- ☐ Do you have any foreign bank accounts or have a signatory authority over a foreign bank account
- ☐ During the year did you purchase or sell any investment property, stocks, or bonds
- ☐ Were any personal or business debts cancelled or forgiven during the year

- _____ Provide a record of estimated tax payments made during the year, if any
- _____ Provide copies of your W-2's. The W-2 must separately state the amount of Qualified Tips and/or Overtime to be eligible for the 2025-2028 tax deduction
- _____ Provide the following 1099 forms, this is not an all-encompassing list

_____ Interest	_____ Governmental Program Receipts
_____ Dividends	_____ Co-op or Patronage Dividends
_____ Social Security Benefits	_____ Contract Labor/Rent/Commissions
_____ State Tax Refunds	_____ Annuity or IRA Withdrawals
_____ Stock or Bond Sales	_____ Unemployment Compensation
- _____ Provide copies of any K-1's received reporting income/loss from a partnership, S corporation, trust, and/or estate
- _____ Complete worksheets for your business, rental property, or farm/ranch operation
- _____ Teachers – provide your total out of pocket classroom expenses for the year
- _____ Forms 1095A, 1095B, and/or 1095C for Health Insurance Verification
- _____ Form 1098 mortgage interest paid for your home or second home
- _____ Submit the interest statement for your newly financed vehicle. The vehicle must have undergone final assembly in the US, and the VIN must be included
- _____ Closing statements relating to the purchase or sale of any real estate property
- _____ Any tax notices received from the IRS or other taxing authorities
- _____ Divorce decrees, separation agreements, custody agreements and all other supporting documents you feel may be necessary
- _____ When providing invoices to claim the energy credits, you will also need to provide the Qualified Manufacturer Identification Number

Specific to Farmers, Ranchers, and Small Business Owners

- _____ Copies of all employment forms (W-3, 941, 941N, 943, 944, 940, State unemployment)
- _____ Record of payroll tax deposits made during the year
- _____ Completed business use of auto(s) – complete the section on the Business, Rental and Farm organizers
- _____ Purchase invoices on all equipment, vehicles, and livestock purchased, sold, or traded during the year
- _____ Bank issued interest paid statements
- _____ Refund gas tickets if we are filing for the Nebraska Fuel Tax Credit, off road use gas only, do not include vehicle gas tickets
- _____ Statements from your broker for any hedging or commodity transactions
- _____ All CCC (Commodity Credit Corporation) statements reporting sealed grain