



TAX RETURN CHECKLIST: TAX YEAR 2025

Personal & Family Information

<input type="checkbox"/>	<u>Social Security Number(s) or ITIN(s)</u> • Yourself, spouse and qualifying dependents
<input type="checkbox"/>	<u>Full name(s) and date(s) of birth</u> • Yourself, spouse and qualifying dependents

Tax Forms (Yourself and Spouse)

<input type="checkbox"/>	W-2s and Overtime/Tips Information (i.e., Final Paystub)
<input type="checkbox"/>	Self-Employment Income: Revenue (1099-NEC) & Expenses*
<input type="checkbox"/>	Rental Property Income: Revenue & Expenses*
<input type="checkbox"/>	1099-K, Unemployment (1099-G), Cryptocurrency Transactions (1099-B)*
<input type="checkbox"/>	Savings & Investments (1099-INT, 1099-OID, 1099-DIV)*
<input type="checkbox"/>	Retirement Income/Social Security Benefits (1099-R, 1099 SSA, RRB-1099)*

***If Applicable**

IMPORTANT 2026 DATES

Date	
Jan. 31, 2026	Last day to send W-2 forms to employees
	Last day to send 1099-NEC forms to sub-contractors
Mar. 16, 2026	File Partnership & C-Corp. returns
	Request an extension to file (Partnership & C-Corp.)
Apr. 15, 2026	File Individual & S-Corp returns
	Pay taxes and request an extension to file (Individual & S-Corp)

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