2025 TAX CHECKLIST (Required)

Provide this completed Tax Checklist along with your tax documents to your Tax Preparer. The numbers below correspond to last year's 1040 tax return. Use that return to help you fill this out for 2025. For any questions, reach out to your tax preparer or your LifePlan team at client@lifeplangroup.com.

Yes No

☐ ☐ Is all your Personal Information, filing status, etc. on top of your 2024 return the same this year?
If no, what changed:____

Check the boxes for any **income** sources in 2025. For any checked boxes submit the proper tax document(s).

☐ 1a: W-2 Income	☐ 4a: IRA Distributions	☐ 8: Sch. 1 Rental Income*
☐ 1b-i: Specialty Income (Rare)	☐ 5a: Pensions or Annuities	☐ 8: Sch. 1 Business Income*
☐ 2a&b: Interest Income	☐ 6a: Social Security Benefits	☐ 8: Other Sch. 1 Income
☐ 3a&b: Dividends	☐ 7: Capital Gains	**Provide Documentation for Sch E/C*

Yes No

☐ ☐ IRA/SEP contribution completed (or want to)? Details:____________________________

☐ ☐ ROTH **contribution** completed (or want to)? Details:____________________________

☐ ☐ ROTH **conversion** completed? Amount & Date:_______________________________

☐ ☐ If older than 70.5, Any IRA charitable gifts (QCD)? Total Amount:____________________

☐ ☐ Are you claiming the Standard Deduction? If no, Submit a Schedule A to itemize deductions

☐ ☐ Any credits to report? Education, Energy, Home Efficiency, etc. See Schedule 3. If yes, Details:

____

☐ ☐ Had Affordable Healthcare Act Insurance (Obamacare/Exchange)? If yes, provide 1095-A

☐ ☐ Sell, purchase or refinance any real estate? If yes, provide closing statement, etc.

☐ ☐ Make gifts of over $19,000 to any one individual?*

☐ ☐ Contribute to a Health Savings Account (HSA) **outside** of payroll (uncommon)?*

☐ ☐ Provide or receive any Alimony payments?*

☐ ☐ Have you been notified by the IRS or State of changes to previously submitted tax return?*

☐ ☐ Owned or had signatory authority over any foreign accounts or foreign assets?

☐ ☐ Any online or out-of-state purchases for which sales tax was not paid?

☐ ☐ Owned, acquired, or disposed of any digital assets (i.e. cryptocurrency)?

If yes on any * please provide details:

____

____

☐ ☐ Did you make any estimated/quarterly payments (Federal or State) for 2025? If yes, provide below:

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Fed Amt & Date	________	________	________	________
State Amt & Date	________	________	________	________

☐ ☐ Do you want a refund applied to next year? If yes, how much? $__________Or __________%

For any refund not applied to next year, how would you like to receive it? **Check only one.**

☐Same account as last year's tax return (see line 35 on 2024 1040)

☐Different account: Rout#____________Acct#____________ ☐Checking OR ☐Savings

☐Have it mailed to my address on the return (not recommended)

☐I'm confident I will owe, the above is not necessary!

☐ ☐ I have other tax items/details not notated above that I will share directly with my tax preparer

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