

# 2025 TAX SEASON CHECKLIST FOR INDIVIDUALS

We have prepared this tax season checklist so that you can ensure that you have all the necessary documents and are ready to file your 2024 Income Tax Return.

\*\*\*Please, make sure of which forms apply to your specific case as a taxpayer\*\*\*



## Personal Information

- Copy of Proof of Identity, such as ID/Driver's License, Passport, etc.
- Copy of Social Security Card or ITIN Card/Letter.
- Copy of Work Permit, when required by SSN Card.
- When a taxpayer is **married**, the spouse's full name, SSN or ITIN, and date of birth.
- When a taxpayer has **dependents**, then a copy of the dependent's Social Security card, a copy of the dependent's ID/Driver's License/Birth Certificate.

## Income Information

- Form W-2s for wages earned as an employee during the 2024 fiscal year.
- If any self-employment income and/or business income was earned during the 2024 fiscal year, Form 1099s or Schedule K-1, Proof of Income (e.g., Bank Statements, Invoices/Sales Receipts, etc.), and Proof of Expenses related to the Income (e.g., Purchases Invoices/Receipts, Bank Statements, etc.).
- Form 1099-G if any unemployment income was received during the 2024 fiscal year.
- Form 1099-DIV, 1099-OID, 1099-S, 1099-SA, 1099-SA, and/or 1099-B for qualified dividends, capital gains, distributions (e.g., stocks, investment accounts, etc.) received during the 2024 fiscal year.
- Form 1099-INT for any received interest from a savings bank account, money market, or other similar investment accounts during the 2024 fiscal year.
- Detailed report or records of all transactions for digital assets (e.g., cryptocurrency, NFTs, etc.) that were bought or sold during the 2024 fiscal year.
- If any Rental Property Income was earned during the 2024 fiscal year, Form 1098 (Mortgage Interest, if applicable), Record of Income and expenses related to the rental property income (e.g., Management Fees, Repairs, Property Taxes, etc.), Information on Assets Purchased for the rental property (if applicable).
- Form W-2G if any income from gambling (e.g., casino, lottery, etc.) winnings was received during the 2024 fiscal year.
- Forms 1099-R or SSA-1099 if you received retirement income and/or social security benefits during the 2024 fiscal year.
- Other Income Forms, if applicable: 1099-MISC, 1099-NEC, 1099-K, etc.

## Other Documents (if applicable)

- Copy of tax return from the previous year (e.g., if filing your 2024 tax return, copy of your 2023 tax return).
- Forms 1095-A, 1095-B, and/or 1095-C if you received health coverage (e.g., marketplace, employer-provided, etc.).
- Form 1098-T if you, or any of your dependents, were enrolled in an eligible educational institution at the college or university level during the 2024 fiscal year.
- Foreign bank account information.

**IMPORTANT: Other documents may apply for the preparation of your 2024 Income Tax Return after evaluating your specific tax situation.**