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FY 2025

## Individual Taxpayer Abbreviated Checklist

Taxpayer Name(s): \_\_\_\_\_

**\*\*\*SOME TAX DOCUMENTS ONLY AVAILABLE ONLINE**

**MOST COMMON TAX ITEMS- SEE DETAILED CHECKLIST FOR COMPREHENSIVE LIST**

Income/Deduction	Tax Document	Common Description	Applies
Wages/Salary	W-2	\$\$ earned from a job	<input type="checkbox"/>
Interest Income	1099-INT	Interest earned from bank or investment accounts	<input type="checkbox"/>
Dividend Income	1099-DIV	Dividends earned from bank or investment accounts	<input type="checkbox"/>
Investment Income	1099-B	Gains/losses from sale of investments	<input type="checkbox"/>
Retirement Income	1099-R	IRA/401k/Pension withdrawal (or rollover)	<input type="checkbox"/>
Social Security	SSA-1099	Social security or disability income	<input type="checkbox"/>
Unemployment	1099-G	\$\$ from government unemployment	<input type="checkbox"/>
HSA/MSA	1099-SA	Distribution from health savings account	<input type="checkbox"/>
Gambling	W2-G	Winnings from lottery/gambling	<input type="checkbox"/>
Entity Income	K-1	Partnership, S-corp or Trust income/loss	<input type="checkbox"/>
Property Sale	1099-S	Proceeds from real estate sale	<input type="checkbox"/>
Debt Cancellation	1099-C	Creditor writes off debt you owe them	<input type="checkbox"/>
Alimony	Divorce agreement	\$\$ paid by ex-spouse excluding division of marital assets & child support	<input type="checkbox"/>
Business Income	1099-NEC 1099-MISC	Contractor, sole proprietor or rental income- use separate template/consult LCT	<input type="checkbox"/>
Health Insurance	1099-HC 1095-A	Proof of health insurance coverage for MA return. Health Connector insurance must provide 1095-A to file	<input type="checkbox"/>
Tuition	1098-T	\$\$ paid for college expenses (restrictions apply)	<input type="checkbox"/>
Student Loan Interest	1098-E	Interest paid on college loans	<input type="checkbox"/>
Childcare	Receipts	Daycare, aftercare, camps for dependents ages 0-12. Need \$\$ for each provider broken down by kid	<input type="checkbox"/>
IRA Deduction	5498	Contributions if not covered by employer retirement plan	<input type="checkbox"/>
TIPS/Overtime Deduction	W-2	OBBBA deduction for Tipped employees/overtime pay	<input type="checkbox"/>
Energy Improvements	Invoices	Solar, Heating, Insulation, Windows/Doors	<input type="checkbox"/>
Other	Invoices	septic, lead, electric cars, adoption	<input type="checkbox"/>
Medical Expenses	Receipts	Medical/dental expenses not reimbursed or pre-tax, including mileage (provide total miles)	<input type="checkbox"/>
Mortgage Interest	1098	Interest paid on primary/secondary home loans	<input type="checkbox"/>
Car Loan Interest	Form 1-A	OBBBA form for new 2025 car loan interest	<input type="checkbox"/>
Taxes	Invoices	Real estate, excise, local, sales taxes (\$40k limit)	<input type="checkbox"/>
Charity	Receipts	Cash & Noncash charity (provide separate totals)	<input type="checkbox"/>
Gambling Losses	Receipts	Total loss on lottery/gambling (save proof)	<input type="checkbox"/>
Massachusetts	Receipts	Rent expense, tolls/parking/commuter pass (W-2 employees)	<input type="checkbox"/>
MA Sr. Circuit Breaker	Receipts	Water & sewer paid, real estate taxes paid, rent paid	<input type="checkbox"/>
Estimated Taxes	Listing	Federal & State estimated taxes paid (Dates & Amounts)	<input type="checkbox"/>
Payments/Refunds	Bank	IRS now requires direct deposit and direct payments (no checks)	<input type="checkbox"/>