ASCEND
CPA and Advisors, LLC

Due Dates:
4/15/26 & 10/15/26 (with Extension)

2025 Individual Income Tax Checklist

GENERAL INFORMATION

	Legal Name	SSN	D/O/B	Occupation	Identity Protection Pin
Taxpayer					
Spouse					

Address _____

Telephone _____ Email address _____

Bank Information for Direct Deposit/ACH

Bank Routing Number _____

Account Number _____ ☐ Checking ☐ Savings

Dependents

	Legal Name	SSN	D/O/B	Relationship	Attending College?
Dependent					☐ Yes ☐ No
Dependent					☐ Yes ☐ No
Dependent					☐ Yes ☐ No
Dependent					☐ Yes ☐ No
Dependent					☐ Yes ☐ No

Child Care Provider's Name _____

Child Care Address _____

Child Care Tax ID Number _____ Amount paid $ _____

How would you like to receive your copy of the Tax Return (check one or both)

Printed ☐ Electronic ☐

PERSONAL INFORMATION

☐ Yes ☐ No Did your marital status change during the year?
☐ Yes ☐ No Did you or your Spouse turn 65 years old in 2025?
☐ Yes ☐ No Did your address change during the year?
☐ Yes ☐ No Did you purchase a new property in 2025?
☐ Yes ☐ No Did you adopt a child under the age of 18? If yes, please include documentation and a list of your costs.
☐ Yes ☐ No Did you support any children under age 18 or full-time students under age 23 at the end of the tax year who earned interest/dividend income or other investment income?
☐ Yes ☐ No **Did you obtain health insurance through the Marketplace? If so, please provide Form 1095-A (IMPORTANT)**

INCOME ITEMS (Please attach relevant documents)

☐ Yes ☐ No W-2s provided by your employer(s)
☐ Yes ☐ No Did you receive any Tips that were not reported on your W-2?
☐ Yes ☐ No Social Security Benefits (Form SSA-1099)
☐ Yes ☐ No Interest and Dividend Income (Form 1099-Int and Form 1099-Div)
☐ Yes ☐ No Did you earn income as a household employee for work as a nanny, private nurse, maid, etc., that was not reported on Form W2? If so, please list the amount received.
☐ Yes ☐ No Did you work Overtime in 2025? If so, please provide the amount of compensation received for overtime.
☐ Yes ☐ No Did you have an interest in or authority over a financial bank or investment account in a foreign country?
☐ Yes ☐ No Business Income reported on Form 1099-Misc (If yes, please complete Business Tax Checklist)
☐ Yes ☐ No Sale of Stocks, Bonds, or Other Investments (Please provide 1099-B or Alternate Sales Records)
☐ Yes ☐ No Did you invest in a Work Opportunity Zone to defer capital gains income?
☐ Yes ☐ No Did you sell or exchange Cryptocurrency? Please provide report showing cost basis.

ASCEND
CPA and Advisors, LLC

Ron Harris, CPA

Individual Tax Checklist - Continued

☐ Yes ☐ No Did you purchase a rental property that you leased to a 3rd party? If so please provide the settlement statement and complete the Real Estate Tax Checklist.

☐ Yes ☐ No Did you sell your primary home or an investment property? (Attach Settlement Statement)**(Complete Real Estate Tax Checklist)**

☐ Yes ☐ No IRA/Pension distributions / Rollovers (Form 1099-R and/or Form 5498)

☐ Yes ☐ No State and local tax refunds (Form 1099-G)

☐ Yes ☐ No Unemployment Income (Form 1099-G)

☐ Yes ☐ No Did you receive interest income from a loan you extended to another person?

☐ Yes ☐ No Gambling winnings (Form W2-G/Form 1099); Prize money or in-kind? (If yes, also list gambling losses.)

☐ Yes ☐ No Paid Tuition Expenses (Form 1098-T)

☐ Yes ☐ No Student Loan Interest (Form 1098-E)

☐ Yes ☐ No Cancelled or Forgiven Debts (Form 1099-C) or Abandoned Property (Form 1099-A)

☐ Yes ☐ No Distribution from an Education Savings Account or Qualified Tuition Program (Form 1099-Q)

☐ Yes ☐ No Did you make a back door or mega back-door Roth IRA contribution in 2025? If yes, please provide documentation.

☐ Yes ☐ No Did you receive income from Royalties? (1099)

☐ Yes ☐ No Have you taken part in any Retirement Planning, or have you established a Trust or a Will to ensure that assets are distributed in a manner that you approve?

ESTIMATED INCOME TAX PAYMENTS

☐ Yes ☐ No Did you make any estimated payments for 2025? If yes, please list the amount and date paid below.

$ _____ Payment Date: _____ $ _____ Payment Date: _____

$ _____ Payment Date: _____ $ _____ Payment Date: _____

ITEMIZED DEDUCTIONS (Please respond and attach documents.)

☐ Yes ☐ No Medical expenses? (e.g. doctor visits, pharmacy, insurance, hospitalization, supplies) **$** _____

☐ Yes ☐ No Medical miles? How many miles did you drive to tend to medical/dental needs? _____

☐ Yes ☐ No Did you incur expenses for long term care or pay premiums from long term care insurance? If yes, please list amounts paid. **$** _____

☐ Yes ☐ No Did you purchase a vehicle? If so, how much sales tax was paid? **$** _____

☐ Yes ☐ No Did you finance the purchase of a new vehicle? If so, how much interest was paid in 2025. **$** _____

☐ Yes ☐ No Did you register vehicles in 2025? Please list the amount you paid for each. **$** _____

☐ Yes ☐ No Real estate taxes paid on primary residence/second home? Please list. **$** _____

☐ Yes ☐ No Mortgage interest and mortgage insurance paid (Form 1098) **$** _____

☐ Yes ☐ No Did you pay investment interest? If so, please list. **$** _____

☐ Yes ☐ No Did you refinance? If so, please provide a copy of your settlement statement.

☐ Yes ☐ No Did you make any charitable **Cash/Check** donations? If yes, attach list of recipients and amounts. **$** _____

☐ Yes ☐ No Did you donate any in-kind (non-monetary) items to charity that totaled over $500?

If yes, please provide donation receipts with the fair value of the items at time of donation.

☐ Yes ☐ No Charitable Miles? Please list the number of miles driven for charitable purposes. _____

☐ Yes ☐ No Were you a victim of a qualified disaster resulting in a casualty loss? **$** _____

Please describe your damages and the value of the items not paid for by insurance.

ASCEND
CPA and Advisors, LLC

Ron Harris, CPA

OTHER ITEMS

☐ Yes ☐ No Did you or your spouse contribute to an IRA for tax year 2025? Please list the amount(s). $ _____

☐ Yes ☐ No Did you have unreimbursed employee expenses? Please list.*(Deductible with some states only)* $ _____

☐ Yes ☐ No Did you have unreimbursed military reserve or national guard expenses? Please list. $ _____

☐ Yes ☐ No Did you have unreimbursed expenses if you are an artist who worked for more than 1 employer? $ _____

☐ Yes ☐ No Did you start or acquire interest in a partnership or S Corporation? (If yes, complete the Business Tax Checklist) Did you purchase or sell your primary home, take a home equity loan, or acquire a second home?

If yes, please attach your settlement statement and any other pertinent documents.

☐ Yes ☐ No Prior to September 30, 2025, did you purchase an electric vehicle. If so, please provide the purchase document.

☐ Yes ☐ No Did you purchase an EV Charger or related refueling property in 2025? If so, please provide the receipt. (This credit will be available until June 30, 2026.)

The residential clean energy credit under IRC Section 25D, is still available for tax year 2025.

☐ Yes ☐ No Did you purchase any of the following items prior to the expiration date of December 31, 2025: Solar panels, water heater, geothermal heat pump, battery storage, or a wind turbine?

☐ Yes ☐ No Did you install exterior doors/windows, install insulation/air sealing materials, purchase a new HVAC unit, furnace, water heater, or conduct a home energy audit? If yes for any of these items, please list the date(s) and amounts paid for each.

Description of item(s) purchased	Cost
_____	$ _____
_____	$ _____
_____	$ _____
_____	$ _____
_____	$ _____

☐ Yes ☐ No Did you, your spouse, or dependents incur any tuition expenses to attend a college, university, or vocational school? **Please attach Form 1098-T.** Please list expenses below:

Books _____ Computer/Laptop _____

Supplies _____ Tuition _____

☐ Yes ☐ No Were you the victim of a natural disaster in 2025? If yes, please provide the location/nature of the disaster and other detail.

_____

☐ Yes ☐ No Were you the victim of fraud in 2025? If yes, please provide detail including the amounts lost and reimbursed by insurance.

_____