



**2025 Tax return checklist**

As a new Client of John Tangen CPA I wanted to welcome you to my practice. I strive to build long term relationships with my Clients. My goal is to be a trusted advisor.

Taxes are generally very consistent. You should always start your current year tax preparation by reviewing your prior year tax filing.

I have provided the below information to help you prepare your current year taxes.

Please use this as a guide, or starting place for preparing your 2025 taxes.

Income:	Current Year	Prior Year
Wages (IRS w2)		
Interest Income (IRS 1099 Int)		
Dividend income (IRS 1099 Div)		
Brokerage Statements (From 1099-A, B, S)		
IRA/ Pension/ Annuity Income (IRS 1099 R)		
Schedule K-1s (IRS K-1)		
Miscellaneous Income and Adjustments (IRS 1099 Misc, NEC, G)		
Rent and Royalty Income		
Digital Asset Proceeds From Broker Transactions (IRS 1099 DA)		

Itemized deductions	Current Year	Prior Year
Medical/Dental Expenses .....		
Real Estate Taxes .....		
Property Taxes .....		
Mortgage Interest (Form 1098) .....		
Charitable Contributions .....		

Other

Estimated payments	Quarter	IRS \$ amount	State \$ amount
	1 <sup>st</sup>		
	2 <sup>nd</sup>		
	3 <sup>rd</sup>		
	4 <sup>th</sup>		

Provide any tax related information not listed above, e.g. new brokerage statements, K-1 investments, etc.

Also, I am requesting that you upload a picture of your State drivers license to the secure portal.

\*\*