

Please Use The Checklist To Gather The Tax Documents That Apply To You	
Updated Banking Info (If Different From Last Year)	
Form(s) W-2 From All Employers	
Form(s) 1099 Consolidated Statement From Brokerage	
Form(s) 1099-C For Cancellation Of Debt	
Form(s) 1099-DIV For Dividend Income	
Form(s) 1099-G For Unemployment and/or State Tax Refund	
Form(s) 1099-INT(s) For Interest Income Received	
Form(s) 1099-K(s) For Electronic Payments Received	
Form(s) 1099-MISC(s) For Rental & Other Income	
Form(s) 1099-NEC (s)	
Form(s) 1099-R For IRA Distributions	
Form(s) 1099-R For Retirement Income	
Form(s) 1099-SSA For Social Security Benefits	
Form(s) 5498-SA For Contributions To A HSA	
Form(s) 1099-SA For Distributions From A HSA	
Form(s) 5498 IRA Contribution Information	
Form(s) 1098-E (or an equivalent) Student Loan Interest Paid	
Form 1095-A Health Insurance Marketplace	
Form(s) 1098-T For Tuition Paid (for you and/or your dependents)	
Gain Loss Report For Digital Currency	
Any & All Other 1099's Received	
Form(s) 1098-INT Mortgage Interest For All Lenders	
Property Taxes Paid (If Not Included On Form 1098)	
Closing Documents If A Home Was Purchased Or Sold	
Childcare Expenses Paid <b>(please provide annual amounts per child per provider)</b>	
Childcare Provider Federal & Hawaii Tax ID # (if not the same provider as last year)	
Ask them to complete the forms below if you don't have your providers tax ID numbers	
Federal: <u>A Form W-10</u>	
Hawaii: <u>A Form HW-16</u>	
Classroom Expenses Paid By Teachers (only)	
Cost of Safety Deposit Box	
Donations Made With Cash, Checks, Or Electronic Payment To Qualified Non-Profits	
Donations Of Goods (Signed Statement From Organization Required)	

Total Miles Driven On Behalf Of A Non-Profit Organization (charitable miles)	
Long Term Care Insurance Paid In Tax Year (if applicable)	
Medical Miles Driven & Logged In Tax Year	
Total Medical Expenses For Tax Year (please specify expenses paid with HSA funds)	
Total Medical Insurance Paid In Tax Year	
Retirement Contributions Made (not through an employer)	
Union Dues Paid In Tax Year	
Identity Protection Pin For Calendar Year 2025	
Confirmation Of Federal Estimated Tax Payments Processed	
Confirmation Of State Estimated Tax Payments Processed	
Did You Purchase An Electric Vehicle? Please Provide Make, Model, Purchase Date & Purchase Price Of Electric Vehicle	
Did you install or expand a solar system? Type Of Energy Improvements Made, Date Of Completion & Total Cost. If Solar Energy Was Installed Please Provide Total KW Output	
Do you have foreign bank accounts or investments? If Foreign Bank/Investment Accounts Had A <b>Combined Balance Of \$10,000</b> Or Greater On <b>Any One Day</b> Please Provide Name, Address, Account #, High Balance & Date Of High Balance For Your FBAR (Foreign Bank Account Reporting)	
Did you suffer a loss due to a natural disaster? Circumstances Around Theft Or Natural Disaster Losses. Need to know the following: Date of Event, Cost Of Items Lost, Fair Market Value Of Items On Date Of Event, Fair Market Value Of Items After Event, Was A Police Report Filed?	

<b>Business Owners &amp; Freelancers Please Use This Checklist</b>	
Profit & Loss Report (if you need a template you can find one @ <a href="https://www.equationshawaii.com/prepare-for-your-tax-meeting">https://www.equationshawaii.com/prepare-for-your-tax-meeting</a> )	
Balance Sheet Report Note: Not All Businesses Need To Provide This. Business Owners Using Accounting Software, Multi-Member LLC's, S Corporations, and C Corporations Are Required To Provide This Report	
Confirmation Of Federal Estimated Tax Payments Processed	
Confirmation Of State Estimated Tax Payments Processed	
Form(s) 1099-NEC's Received	
Form(s) 1099-K(s) For Electronic Payments Received	
Form(s) 1099-MISC(s) For Rental & Other Income	
Any & All Other 1099's Received	
LLC's, S Corporations & C Corporations - New Clients Must Provide Operating Agreements/Bylaws, Existing Clients Must Provide Amendments	
Any Tax Credit Certificates Received	