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It's 2025, can you believe we are heading into a quarter of this century. We want to thank you for entrusting us to complete your prior tax returns! Please use this list as a general guide as you prepare to come see us this year.

**IDENTIFICATION/BANK INFO:**

- Current picture ID
- Social Security cards for ALL new dependents
- Routing & Account Numbers for direct deposit (use check not deposit slip)

**INCOME STATEMENTS (here is a list of the more common ones):**

- W-2's from each place you were employed in 2024
- W-2 G's from any gambling winnings
- All 1099's including (but not limited to)
  - (1099 INT/1099 DIV) Interest/Dividends earned from banks and other investments
  - (1099-NEC) Self Employment Income
  - (1099 Misc) Rental Income, Other Income, **virtual currency**
  - (1099-K) Credit card sales, virtual currency, gig economy**
  - (1099-R) Pension, Annuity, Retirement plan distributions
  - (1099-G) Unemployment/State Tax Refund
  - (1099-B) Broker Statements (ex: sale of stocks, options, **virtual currency**)
  - (1099-C) Cancellation of Debt (forgiveness of debt)
  - (SSA-1099) Social Security Benefits
  - \*\* (1099-SA) HSA Distribution/ (5498-SA) HSA Contribution**

Make sure to let us know what energy related home improvements you did in 2024.

This could include new:

- exterior doors, windows, and skylights,
- central A/C units,
- electric panels and related equipment,
- natural gas, propane and oil water heaters, furnaces, or hot water boilers,
- Insulation
- Solar...the list goes on.

**CONTRACT LABOR/SELF- EMPLOYMENT INFORMATION:**

- Add all income earned from self- employment or contract labor
- Separate and total all expenses incurred as a result of your self-employment income such as supplies, tools, materials, business vs personal miles driven, car expenses, etc
- CHECKLIST FOR DAY CARE PROVIDERS AVAILABLE ON OUR WEBSITE**

**ITEMIZED DEDUCTIONS: (BRING IT IN—YOU MAY STILL BE ABLE TO ITEMIZE)**

- Medical, dental or eye care expenses including **after-tax** insurance premiums
- Real Estate Taxes, Personal Property Taxes (boats, cars, trailers, etc) (MTR VEH TAX on pink slip)
- Sales Tax paid on vehicles, motorcycles, RV's, planes & boats
- Home Mortgage Interest (Form 1098) from each mortgage if more than one
- Cash & Non-Cash charitable contributions (Church, Salvation Army, United Way, etc)

**EDUCATION EXPENSES:**

- (1098-T) Tuition, deductible expenses for education (must have the 1098-T to claim any education credits)
- (1098-E) Student Loan interest (must have the 1098-E to claim student loan interest)

**AFFORDABLE CARE ACT (aka Obamacare):**

- **(1095-A) IF INSURANCE IS FROM THE MARKETPLACE AKA OBAMACARE YOU MUST WAIT FOR THIS FORM.**

***Filing the return without this form causes the return to be rejected until it is included.***

**CHILD CARE EXPENSES:**

- Provider name, address, EIN or SSN
- Amount paid for each child

***Do you pay childcare for your DEPENDENT under 6 and your household income is less than \$150,000? If so, call us about the NEW Nebraska Child Care credit.***

If there are any questions as to whether you should bring something or not, the best advice is to bring it with you.  
**Please check out our website at [www.associatedtaxomaha.com](http://www.associatedtaxomaha.com)!**

**Looking forward to seeing you! ~Betty, Page, & Melissa**