



Hawkins Accounting, Inc
2904 Francis St,
Jackson, MI 49203
(517) 782-0600
www.HawkinsAccounting.com

Annual Checklist

New clients:

☐ We need a copy of last year's income tax return, Social Security (and ITIN) numbers and cards, birthdates for everyone on the return (spouse, children, and other dependents) are needed

Returning clients:

☐ Social Security (and ITIN) numbers and cards, birthdates for **NEW** spouse, children, and other dependents.

If you have moved during the year, provide your new address and date you moved

All Clients:

Direct deposit information

Income:

- ☐ **W2(s)** for every job you (and spouse) had during the year
- ☐ **W2G(s)** for gambling winnings, including internet gaming, and mobile phone apps
- ☐ **1099 G** if you received Unemployment during the year
- ☐ **1095A** if you purchased health insurance through the Marketplace
- ☐ **1099 NEC(s)** if you are self-employed
- ☐ **1099 MISC** for other income
- ☐ **1099 INT** Interest
- ☐ **1099 R** IRA or 401K distributions and Rollovers
- ☐ **1099 R** Pension distributions
- ☐ **1099 SA** Social Security distributions
- ☐ **1099 DIV** Dividend Income
- ☐ **1099 B** Investment Income
- ☐ **1098 E** Student Loan Interest
- ☐ **1099A** Abandonment
- ☐ **1099G** Tax Refund
- ☐ **1099S** Real Estate Sales
- ☐ **1099C** Cancellation of Debt

Other Income:

Capital gains/losses from Sales of Stocks or Bonds

- ☐ Date of purchase and amount paid for stock/bonds to compute capital gains

Rental Properties

- ☐ Income & Expenses and business mileage

Self-Employed

- ☐ Income & Expenses and business mileage

Foreign Income

K-1(s) from Partnership, S-Corporations, Estates and Trusts

Expenses:

- ☐ Expenses for childcare (provider name, address, and Tax ID number) and whether FLEX Plan money was used to pay for care
- Education Credits
 - ☐ College Tuition statement, 1098T(s) AND **Financial printout from the college** plus the cost of books and equipment needed for classes
 - ☐ Purchase qualifying for Residential Energy Credit
 - ☐ IRA Contributions/Retirement Contributions
 - ☐ HSA Contributions
 - ☐ Educator Expenses

If you itemize, deductions must total more than the Standard Deduction

Single \$15,750 MFJ \$31,500 HH \$23,625

- ☐ Medical Expenses
- ☐ Mortgage Interest
- ☐ Sales tax Paid on Major Purchases
- ☐ Property Taxes paid
 - Please bring 2025 Summer and Winter Property Tax Statement
- ☐ Vehicle License Plate
- ☐ Charitable Contributions (Cash and Non-Cash)/ Mileage
(must have receipt or check stub)
- ☐ Sales Tax on Major Purchases
- ☐ Use Tax: Online purchases on which sales tax was not paid