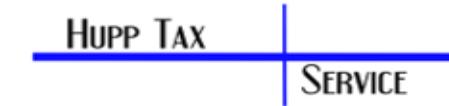


What to Bring

tax year 2025

www.hupptax.com

32341 Vine Street, Willowick, OH 44095 ph: 440.944.4343 fax 440.944.4341 email: taxhelp@hupptax.com



Please Bring: (please don't staple)

Name: _____

- Anything marked "Important Tax Document"
- W2s, 1099s, etc. (showing income)
- 1098s & 1099s (showing deductions, payments, etc.)
- 1098-T for students. (REQUIRED for education credits)
- 1095-A (Marketplace health insurance)
- Prior year tax return (if not prepared by Hupp Tax)

Changes during 2025:

Moved (when?) _____

Moved (where?) _____

Did you get (circle) : Married / Divorced / Separated?

If so, when? _____

New Dependent? Include name, relation, DOB & SSN

Some Key Changes for tax year 2025 (not all inclusive)

- IRS eliminating paper checks. Must use direct deposit, online payment or other electronic method.
- Final year for Energy Credit (windows, solar, etc). Need new Qualified Manufacturer ID (QMID) for each product.
- New deduction for tips and overtime*. This should be reported on your W2 in box 12 or box 14.
- New deduction for car loan interest.* This is for new car purchases in 2025 with final assembly in North America.
- New deduction up to \$6,000 if over age 65*. Phases out for income over \$75,000 single, \$150,000 married.
- State and local tax (SALT) cap increases to \$40,000* (from \$10,000) for itemized deductions (Schedule A).

* These new deductions are temporary, expiring in 2028 (2029 for the SALT cap).

Quarterly Estimates (please specify if any amounts below were applied from prior year)

	Quarter 1	Quarter 2	Quarter 3	Quarter 4	Total
Federal payments					\$
Ohio payments					\$
City (RITA, CCA, Geneva, etc)					\$

Digital Assets - Did you receive, sell, or exchange any digital assets? Yes No

If yes, include 1099-DA and all information related to digital asset transactions.

Self-Employed - summarize income & expenses (see enclosed worksheet or hupptax.com)

Rental Property - summarize income & expenses (see enclosed worksheet or hupptax.com)

Common Tax Breaks - (continued on back)

<input type="checkbox"/> College Tuition - The student's 1098-T is REQUIRED.	
Other required educational fees and books	\$
<input type="checkbox"/> Ohio tax breaks (not all inclusive):	
529 plan contributions. Include list with the amount for each beneficiary.	Limit \$4000 per beneficiary per year.
Scholarship Donation Credit \$750 (see list of qualifying funds at hupptax.com/resources-links)	
Homeschool expenses for each student (books, supplies, NO electronics)	\$

Common Tax Breaks (continued)

Health Savings Accounts (HSA) - Please include the 1099-SA.

Amount contributed (max. \$4,300 Single, \$8,550 family, add'l \$1,000 catch up if over 55)	\$
Was any HSA distribution NOT used for qualified medical expenses?	non-medical amount \$

IRA contributions - max. \$7,000 (\$8,000 if > 50)

Traditional	Owner	Amount	Owner	Amount
	\$		\$	
Roth	\$		\$	

Child & Dependent Care Credit - Expenses paid for day care in order to work or attend school

Provider Tax ID, Name & address:	
Amount spent per child:	Child name _____ Amount \$_____

Medical Expenses - Total expense must be over 7.5% of AGI before any deduction.

****If medical exceeds 7.5%, it can help on the Ohio return, even if it doesn't on the Federal return.*

Health Ins. premiums (not through payroll)	\$	
Prescriptions	\$	
Dentists, Doctors	\$	
Hospitals, Labs	\$	
Long Term Care Insurance	\$	
Eyecare: Contacts, glasses	\$	

Other	\$	
Other	\$	
Miles driven for medical		

Itemized Deductions - Itemizing will help if deductions are more than your standard deduction.

****Note, with the higher SALT cap of \$40,000 some might now benefit from itemizing deductions.****

Standard deduction amounts: Single \$15,750 Married \$31,500, Head of Household \$23,625

- additional standard deduction of \$2,000 (single, HOH) or \$1,600 (MFJ) if 65+ years and/or blind.
- extra deduction for ages 65+ (phase out begins at \$75,000 Single, \$150,000 Joint. \$0 if filing separately)

Mortgage Interest & Property Taxes

Please note amount paid (unless already included on form 1098.)

Interest	Property Taxes
\$	\$

Charitable donations - IRS requires receipts for ALL donations

Cash/Check Donations

Church	\$	
Other	\$	
Other	\$	

Non-Cash Donations *

Goodwill	\$	
Purple Heart	\$	
Other	\$	

* If over \$500, additional detail required; itemized list, value, etc

Gambling losses (not to exceed gambling winnings)

\$
