What to Bring

tax year 2025 **www.hupptax.com**

HUPP TAX SERVICE

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)

☐ **College Tuition** - The student's 1098-T is REQUIRED.	
Other required educational fees and books	$

☐ **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)

	Owner	Amount	Owner	Amount
Traditional		$		$
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) | $