

ARNE REINERT CPA, LLC
P.O. BOX 230
LINDSBORG, KS 67456
(785) 227-3000

This list is designed to assist you in gathering the information required for preparation of your individual tax return. Please provide us with all the following documents **that apply to you** for 2025.

- Form(s) W-2 (wages) and any attachments included with the W-2. If you receive overtime or tips please provide us with your last paystub for 2025
- Form(s) 1099 (interest, dividends, brokerage statements, asset sales, rents, social security, retirement distributions, nonemployee compensation, unemployment, government payments, patronage dividends, crop insurance proceeds, HSA distributions, etc.)
- Form(s) 1099-K
- Form(s) 1098 (mortgage interest)
- Form(s) 1095-A, 1095-B, and 1095-C (health insurance)
- Form(s) 1098-T (tuition)
- Form(s) 1098-E (student loan interest)
- Schedule(s) K-1 (pass-through entity reports)
- Settlement/Closing statements (real estate sales and/or purchases)
- Loan histories/statements on all business loans
- Purchase invoices and finance documents on all business and farm equipment purchases
- Receipts for charitable contributions of more than \$250 and a total of all charitable donations for the year
- Childcare costs, and the name, address, amount and ID# of the recipient
- Property tax paid on your home, autos and other personal property
- Estimated tax payments and dates paid
- Any tax letters or notices received from the IRS or other taxing authorities not previously forwarded to us
- Gallons of gasoline purchased for non-highway use for farm or business purposes

In addition to the above documents, please furnish the following information:

We would also like you to be aware that the new credits for home improvements end this year and can provide you with some tax benefits if you installed a new furnace, air conditioner, boiler, heat pump, water heater, woodstove, windows, doors, insulation, solar or battery storage please be sure to provide us with a copy of the invoice for these improvements.

Please return this with the tax information you send to us. Thank you for your assistance.

Sincerely,

ARNE REINERT CPA, LLC