

Mini Client Organizer

Tax Year 2025

Appointment Date: _____

Appointment Time: _____

New clients only: **Please bring a copy of your 2024 return with all available documentation**

Dependents. If there were any changes to dependents from the prior year, please fill out the following:

Legal Name	Social Security #	Birthdate	Relationship

Estimated tax payments. If you made any estimated tax payments for tax year 2025, please enter the following information regarding those payments:

Payment #	Due Date	Date Paid	Amount Paid
1	4/15/2025		
2	6/16/2025		
3	9/15/2025		
4	1/15/2026		

Income records. Please bring documentation for any and all income you received in 2025. If you are unsure whether we would need a particular document, please bring it in just to be safe. Common forms include:

Form	Description	Form	Description
W-2	Wage and tax statement	SSA-1099	Social Security benefits
1099-INT	Interest income	1099-R	Distributions from pensions, annuities, IRAs
1099-DIV	Dividends and distributions	Forms K-1	Shareholder/partner passthrough income
1099-B	Proceeds from broker transactions	1099-MISC	Miscellaneous income
1099 Consol	Brokerage tax reporting statement	1099-NEC	Non-Employee Compensation
1099-G	Certain government payments	W2-G	Certain gambling winnings

Profit or loss from a business on Schedule C. If you had a small business, please bring in your summarized financial statements by category. If you had the business on last year's tax return, you probably have a good idea of which categories you use. Our website has short articles and guides to use regarding self-employed income. Every situation is different, but here are the small business expenses we typically see on a tax return:

More Common Categories	Less Common Categories
Advertising	Commissions & fees paid
Insurance (other than health)	Rent/lease (machinery, equip)
Legal & professional services	Rent/lease (land, building)
Office expenses	Repairs & maintenance
Supplies	Utilities
Taxes & licenses	Wages paid on W-2
Travel	Depreciation deduction
Meals expense	Business interest paid
Cell phone/internet	Other expenses

Note: The 2025 standard mileage rate was \$0.70/mile. This is often a better deduction than the actual expense method for a business vehicle (gas, insurance, repairs, tabs, maintenance, etc.).

Let us know if you have a home office. There are two methods for taking that business deduction: the simplified method (\$5 sq ft), or actual expenses as a percentage of the total size of the home. We can discuss which would be most beneficial for you.

Income from a rental property on Schedule E. If you had a rental during 2025, please bring in the records of your income and expenses. Every situation can be different, but rentals will often have the following expenses:

Type of Expense	Notes and Examples	Note: If you sold a rental property during 2025, this might have a material impact on your return. Please bring in the closing statement and Form 1099-S (if received from the escrow company). If you purchased or converted your home to a rental property in 2024, let us know so we can go over the documentation required to book that on your return. Additionally, please bring in record of rental income received. This may be on Form 1099-MISC if you use a property management company.
Advertising	Placing ads for the rental	
Auto	Deductible at \$0.70/mile	
Travel	Generally for visits to an out-of-area rental	
Repairs/cleaning/maint	Please bring the receipts	
Mortgage insurance	Generally on Form 1098 if present	
Other insurance	Sometimes on Form 1098, but not always	
Legal & professional	Can include part of the tax return prep fee	
Management fees	Property management company	
Mortgage interest	Generally on Form 1098	
Real estate taxes	Generally on Form 1098	
Utilities	Only if paid on behalf of tenants	
Depreciation	This comes from the cost basis of the rental	
Other expenses	HOA dues or other costs	

Deductions and credits. Please fill-in and bring documentation for 2025 deductions and credits, including:

Form	Description	Medical and Charitable Fill-in	Amount
1098	Mortgage interest statement	Medical deductions, including:	
N/A	Timeshare or private mortgage interest	Prescriptions	
1098-E	Student loan interest	Premiums: Medicare	
1098-T	Tuition statement	Premiums: Medical and dental	
1099-SA	Distributions from a health savings account	Premiums: Long-term care	
1095-A	Health insurance marketplace statement	Fees for doctors and dentists	
N/A	Property tax if not on Form 1098	Fees for hospitals and labs	
N/A	Sales tax on large purchases	Eye glasses or hearing aids	
N/A	RTA tax on vehicle(s)	Long-term care expenses	
N/A	Energy credit costs from the first half of the year	Medical travel costs	
N/A	Child care expenses (daycare costs)	Medical miles driven (# miles)	
N/A	Educator expenses (up to \$300 max)		
N/A	Alimony paid (if eligible for deduction)	Charitable deductions, including:	
N/A	Interest paid on new auto loans (bring the VIN)	Cash donations	
N/A	Last 2025 paystub showing qualified tips	Noncash donations	
N/A	Last 2025 paystub showing overtime pay	Charitable miles driven (# miles)	

IRA contributions. If you made—or will make—an IRA contribution for tax year 2025 (these can be made through the due date of the return) please enter it here:		Traditional IRA	Roth IRA
	Taxpayer		
	Spouse		

Please let us know if you have questions on any of the required documentation. When in doubt, bring it all—any paperwork that might be related in some way to the preparation of your 2025 tax return. We will scan all documents used to compile your return and provide originals back to you along with a copy of your return.

We have an upload portal at lcmillercpa.com/upload/ for those that would like to digitally send in documents. The Access Code is Taxes2025.

Thank you for choosing to work with us this year. Please call (253) 565-9424 for an appointment or book directly to our calendars online at lcmillercpa.com/tax. **Comprehensive tax organizers are available upon request.**