



## Tax Appointment Checklist

All NEW clients, please bring or upload a copy of last year's tax return!

### **Income:**

W-2's

\*\*\*For Employees with tips, or overtime – bring copy of last paystub of 2025\*\*\*

Pension statements (1099R)

Unemployment statement (1099G)

Social Security

All other sources of income

### **Banking/Investments:**

1099-INT - Interest income

1099-DIV - Dividend income

1099-B - Stock trades (purchase dates & prices)

*(For more than 20 trades, please provide an excel file)*

### **Home:**

Mortgage interest statement (1098)

Property tax bill

Closing Disclosure Statement for refinance

Closing Disclosure Statement for purchase or sale

New solar panel purchase/lease documents

New 2025 credits for residential energy home improvements-please send copies of receipts showing the Manufacturer, Ie: exterior doors, windows, insulation, biomass stoves and boilers

### **Sales Tax:**

Receipts for large purchases (car, furniture, etc.)

### **Health Insurance:**

Marketplace statement (1095A)

HSA form (1099SA)

### **Childcare:**

Provider name, address, EIN or SS # and total amount paid

### **College:**

College tuition (1098T)

Student loan interest (1098E)

529 contributions

529 distributions (1099Q)

***\* Include Social Security number for any new dependents\*.***

JOHN NICOSIA OFFERS SECURITIES AND ADVISORY SERVICES THROUGH OSAIC WEALTH

\*Insurance and Tax services offered through Strategic Financial & Tax Planning Services which is not affiliated with OSAIC WEALTH

STRATEGIC TAX PLANNING SERVICES, LLC  
150 MOTOR PARKWAY, SUITE 101  
HAUPPAUGE, NY 11788

**IN ADDITION, PLEASE NOTE SOME OF THE TAX DOCUMENTS LISTED BELOW MIGHT PERTAIN TO YOUR TAX SITUATION FOR TAX YEAR 2025. IF THEY DO, PLEASE BRING THE CORRELATING TAX DOCUMENTS SO THAT WE MAY ACCURATELY COMPLETE YOUR 2025 INCOME TAX RETURNS.**

- 1) IF YOU RECEIVED UNEMPLOYMENT COMPENSATION IN 2025, PLEASE LOG ONTO YOUR STATE UNEMPLOYMENT ACCOUNT AND PRINT A COPY OF 2025 FORM 1099G. ***NYS WILL NOT MAIL YOU THIS DOCUMENT.***
- 2) IF YOU RE-FINANCED OR PURCHASED A HOME AND/OR SOLD A HOME IN 2025, PLEASE BE SURE TO BRING YOUR CLOSING DISCLOSURE STATEMENT(S).
- 3) IF YOU PURCHASED A NEW OR USED CLEAN VEHICLE, **PRIOR TO 9/30/25** (PLUG-IN HYBRID OR ZERO EMISSION ELECTRIC), YOU MAY BE ELIGIBLE FOR THE CLEAN VEHICLE CREDIT. PLEASE BRING YOUR SALES RECEIPTS FROM THE DEALERSHIP (INCLUDING VIN NUMBER) WITH YOU AT TIME OF APPOINTMENT.
- 4) IF YOU DONATED A VEHICLE IN 2025, PLEASE BRING IN THE RECEIPT THAT REFLECTS THE VIN NUMBER. WE WILL NEED THIS TO E-FILE YOUR TAX RETURN.
- 5) ENERGY IMPROVEMENT/EXPENDITURE CREDITS ENDED 12/31/25. **\*\*YOU MUST PROVIDE RECEIPTS WITH MANUFACTURER INFO FOR ANY ELIGIBLE IMPROVEMENTS/EXPENDITURES. \*\***
- 6) IF YOU FINANCED A NEW VEHICLE IN 2025, PLEASE BRING LOAN DOCUMENTS AND YEAR END INTEREST STATEMENT.