STAR Tax Solutions, LLC

Telephone: 949-208-4546
Fax: 949-480-1654
Address: 17880 Skypark Circle, Ste 125
Irvine, CA 92614

Website: www.startaxsolutions.com
Email: startaxsolutions@gmail.com

Client: _____

- Please complete this checklist and upload it to the portal.
- Please include documentation to properly support and explain items checked (✓) below, (e.g., W-2, K-1, 1098, 1099, list of educational expenses, home closing statement, etc.)
- Please attach any additional documentation needed to fully prepare your federal and state tax returns

CHECKLIST FOR 2025 TAX RETURN PREPARATION APPOINTMENT

Income	✓	**Income**	✓
Wages, salaries (Form W-2)		Rents received, rental expenses	
Tip/Overtime Income		Miscellaneous income (Form 1099-Misc)	
Receive, sell, send, exchange, or otherwise acquire any financial interest in any virtual currency		Social Security Benefits received (Form SSA-1099, Form RRB-1099)	
Interest/Dividends received (Form 1099-DIV, 1099-INT)		Pension, annuity income (Form 1099-R)	
Gain/Loss from sale of stocks, bonds, etc. (Form 1099-B)		IRA/401K distributions (Form 1099-R and Form 5498)	
Income from partnerships, estates, trusts, S-corporations (Schedule K-1)		State/local income tax refunds/Unemployment compensation (Form 1099-G)	
Gambling winnings (Form W-2G)		Alimony received (date divorce finalized)	
Business income and expenses (Form 1099-NEC)		Gain from sale of real estate (Form 1099-S)	
Deductions for Adjusted Gross Income (AGI)	✓	**Deductions for Adjusted Gross Income (AGI)**	✓
Alimony paid (Name and SSN of recipient, date divorce finalized)		Student loan interest (certain limitations apply) (Form 1098-E)	
Health Insurance paid by self-employed individual		Penalties on early withdrawal of savings (CDs)	
Health Savings Account (HSA) contributions (Form 5498SA & 1099-SA)		Educator expenses	
Itemized Deductions	✓	**Itemized Deductions**	✓
Charitable contributions		Dues*	
Medical expenses (to the extent they exceed 7.5% of AGI)		Employees business expenses (Auto, travel, etc.) *	
Real estate taxes paid		Expenses to maintain investments (advisory fees) *	
Interest paid on home mortgages (Form 1098)		Special work clothes*	
State and local income taxes paid		Home office deductions*	
Gambling losses (up to the extent of gambling winnings)		Professional subscriptions*	
Car License registration fees paid		Tax Preparation fees*	
*These expenses are deductible to the extent they, in aggregate, exceed 2% of your AGI (For state tax return only)			
Expenses	✓	**Expenses**	✓
Child and dependent care expenses		Adoption expenses	
Rent for your personal residence (CA. MA, NJ residents only)		Estimated tax payments made during the year (dates and amounts paid)	
Energy efficient improvements made in your home		Education expenses (1098-T)	
Miscellaneous	✓	**Miscellaneous**	✓
Did you pay interest on a loan for a **new** vehicle purchased after 2024? If yes, provide details.		Health insurance for everyone being claimed on the tax return	
Financial account/s in foreign countries		Purchase a home	
Balance/s greater than $10000 in any foreign financial account/s		Contributions to IRA, 401(K)	
Driver's License details (For Taxpayer and Spouse): State, Number, Date of issue and Expiration date		Foreclosure, or cancellation of debt	