

2025 INCOME TAX DATA-ITEMIZER

Luschin & Luschin CPA's, Inc.

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PLEASE PROVIDE THE ITEMS BELOW

* new driver's license info if renewed in 2025 or 2026

* SECURE PORTAL *

Upload your tax documents using our secure portal at the link below:

<https://luschinandluschincpas.leapfile.net>

PERSONAL INFORMATION

Taxpayer's Name		Soc. Sec. No.	
Spouse's Name		Soc. Sec. No.	
Taxpayer's Occupation	Birth date	Blind?	Y/N
Spouse's Occupation	Birth date	Blind?	Y/N
Address			
Phone		E-mail address	
Taxpayer's driver's license #	Issue date	Expiration date	
Spouse's driver's license #	Issue date	Expiration date	
Did you buy, sell, or trade any digital assets in 2025? Y/N			
Do you have any foreign income or foreign bank accounts? Y/N			

ESTIMATED TAX PAYMENTS

	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
	1st quarter		2nd quarter		3rd quarter		4th quarter	
Federal								
State								
City								

DEPENDENTS

	Name	Soc. Sec. No.	Birth date	Relationship
1				
2				
3				
4				
	Annual Income	Supported by you?	Full-time student?	months in your home?
1	\$	y/n	y/n	
2	\$	y/n	y/n	
3	\$	y/n	y/n	
4	\$	y/n	y/n	

**PLEASE NOTE THAT IF YOU CLAIM A DEPENDENT ON YOUR TAX RETURN HE/SHE
CAN'T CLAIM HIMSELF/HERSELF ON HIS/HER TAX RETURN.**

DOCUMENTS TO BRING

W-2s	1099-INTs	1099-MISC	1099-Gs
K-1s	1099-DIVs	1099-Bs	Settlement Papers
Social Security Statement		1099-NEC	(sale of home)

EXTENSION FILERS

**Please remember that filing an extension only extends the due date for your tax return,
not any payment due.**

IRS will assess penalty & interest on the balance due from April 15th until it is paid.

RENTAL INCOME AND EXPENSES		OTHER INCOME	
Total Rent Received	_____	Tips	_____
Expenses:		Child Care	_____
Real Estate Taxes	_____	Pensions/Annuities	_____
Utilities	_____	Jury Duty	_____
Mortgage Interest	_____	Royalties	_____
Insurance	_____	Unemployment (1099-G)	_____
Auto Mileage	_____	1099-K	_____
Repairs	_____	Prizes/Lottery Winnings	_____
Supplies	_____	Farming	_____
Other	_____	Self-Employment	_____
		Partnerships & S Corps.	_____
Capital Improvements	_____	Estates & Trusts	_____
		Scholarships & Fellowships	_____
		Tax refunds	_____

SALE OF STOCK OR OTHER PROPERTY				
Description	Date of purchase	Cost	Date of sale	Sales Price

PLEASE BRING ALL SUPPORTING DOCUMENTS.

DEDUCTIONS AND CREDIT ITEMS	
TRADITIONAL IRA/SEP CONTRIBUTIONS Taxpayer _____ Spouse _____ Date Paid _____ Amount _____	CHARITABLE CONTRIBUTIONS Cash Contributions _____ Non-Cash Contributions _____ Auto Mileage _____
ROTH IRA CONTRIBUTIONS Taxpayer _____ Spouse _____ Date Paid _____ Amount _____	NOTE: All donations must be supported with receipts. MEDICAL EXPENSES Medical Savings Account _____ Contributions (MSA) _____ Health Savings Account _____ Contributions (HSA) _____ Insurance Premiums (after tax) _____ <i>(pretax medical premiums are not deductible)</i> Medicare Premiums _____ Prescriptions _____ Eyeglasses/Contacts _____ Doctors _____ Dentists _____ Hospital _____ Ambulance _____ Auto Mileage _____ Other travel expenses _____ Hearing aids & batteries _____ Other medical expenses _____ Reimbursements _____
529 CONTRIBUTIONS (Ohio plans only) Taxpayer _____ Spouse _____ Date Paid _____ Amount _____	
TAXES Real Estate Taxes (paid in 2025) _____ Sales Tax _____	
INTEREST EXPENSE Home Mortgage _____ Home Equity Loan _____ <i>(only if proceeds used to substantially improve home)</i> Student Loan Interest _____	
CHILD CARE EXPENSE Provider's Name _____ Address _____ Tax ID # of provider _____ Amount Paid _____ <i>(may apply to summer camp)</i>	*Excess of 7.5% of adjusted gross income is deductible
EDUCATION CREDITS Name of institution _____ Amount of tuition paid _____ Scholarship money received _____ Who attended _____ What year in school is the student _____	EDUCATION CREDITS (additional students) Name of institution _____ Amount of tuition paid _____ Scholarship money received _____ Who attended _____ What year in school is the student _____

Please provide us with the student's Form 1098-T from his/her school.