



December 2025

Dear Client

As the year winds down, the tax reporting forms begin to arrive, and we want to remind you which forms you should send to us for tax preparation.

If you have prescheduled an appointment, your appointment card is enclosed. If you have a conflict with that date and/or time; please call the office, and we will work to reschedule another time. If you did not preschedule and would like an appointment, please call at your earliest convenience. Otherwise, we do offer a drop-off service allowing you to drop off your documents at the office, and we will call you with questions. You can also email your documents to us using a secure link or mail the documents if that is more convenient. If you would like to use the secure link, call or email the office and we will email you the link.

**Here is a checklist of documents we may need to prepare your return.**

- W-2 Form & Last Paystub of 2025 along with any supporting statements regarding tips or overtime
- W-2G for Gambling Winnings
- 1099-DIV for Dividend Income
- 1099-B for Brokerage Statement
- 1099-MISC for Income
- 1099-SSA for Social Security
- 1099-R for Retirement
- 1098-T for Tuition
- 1095-A for Marketplace Health Ins.
- 1099-SA for HSA Withdrawals
- Form 5498 for IRA Values
- Any IRS or State letters received
- Child Care Costs along with the Name, Address, ID# of your day care provider
- Charitable Donations-Amounts paid to a 501(c)3 Organization (if you itemize)
- Property Taxes paid on your Home or Rent paid in Wisconsin
- Estimated tax payments to Federal and State including dates paid
- 1099-DA & an All Transactions Report for Virtual Currency Transactions
- New Dependent Social Security Card and Date of Birth
- IRA and Roth IRA Contributions for 2025 Tax Year
- If you purchased or sold a home, business property or rental property please bring in your HUD or closing statement
- IRA Contributions for 2025 Tax Year (Traditional or ROTH)
- 1099-INT for Interest Income
- 1099-G for Unemployment or Taxable State Refunds
- 1099-NEC for Income
- 1098-E for Student Loan Interest
- 1099-K for Income
- 1098-Mortgage Interest Statement
- 1098-E for Student Loan Interest
- Form 5498-SA for HSA Contributions
- K-1's for Investments, Partnership or S Corporations
- Banking Information for Direct Deposit

If you have a small business or rental property we can provide you with additional worksheets for those activities if needed. These worksheets are on our website at [aaiwi.com](http://aaiwi.com) or call the office and we can email or mail them to you.

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Crypto-currency activity continues to increase, and you need to report your crypto activity, please be sure to provide us with that information.

New credits for home improvements end this year and can provide you with tremendous tax benefits. If you installed a new furnace, A/C, 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.

Similarly, if you bought a new electric or hybrid car in 2025, please be sure to provide a copy of the invoice and dealer paperwork as well.

This year's new tax bill, One Big Beautiful Bill Act, (OBBBA) provides new deductions for seniors, tips, overtime and vehicle loan interest as well as other changes – too numerous to list. Please be sure to let us know of any changes you've experienced in 2025 when you provide us with your tax documents.

We look forward to working with you this year!

Sincerely,  
All of us at Accounting Associates Inc.

De Anne Chappell, Mary Ellenbolt, Regina Wagner, Jody Mayne, Christy McCartney, Teesha Bacon, Shelly Heer, Shari Leis, Kathy Wagner, Jennifer Krachey, Jennifer Blanchard and Morgan Chappell

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