



LOCKHART & COMPANY, CPAs
1915 Democracy Point, Suite 202
Colorado Springs, Colorado 80908

We are ready to prepare your 2025 tax return!

Below is a list of common items needed to prepare individual income tax returns. Please review the list below and upload your applicable documents to your secure TaxDome portal. Please **notify our team** via chat, email, or call 719-578-8200 once all your documents are submitted and ready for preparation. If you need access to your portal, please visit [Lockhart & Company | Client Portal](#).

- ☐ **Forms W-2, Wage and Tax Statement**
- ☐ **Forms 1099 for all bank and investment accounts (1099-INT, 1099-DIV, 1099-B)**
- ☐ **Forms 1099-R, Distributions from Pensions, Annuities, Retirement**
- ☐ **Forms 1099-G, Certain Government Payments (including unemployment benefits and state income tax refunds)**
- ☐ **Forms SSA-1099, Social Security Benefits**
- ☐ **Schedules K1, Partner/Shareholder Share of Income, Deductions**
- ☐ **Forms 1099-MISC, Miscellaneous Income and Form 1099-NEC for independent contractor income and summary of expenses associated with 1099 income**
- ☐ **Business (Sch C) or rental (Sch E) income and expense summary (P&L or spreadsheet)**
 - NOTE: Please DO NOT provide all receipts—only purchases exceeding \$2,500**
- ☐ **Form 1095-A, Health Insurance Marketplace Statement**
- ☐ **Form 1098, Mortgage Interest Statement**
- ☐ **Property Taxes**
- ☐ **Charitable Contributions**
- ☐ **Forms 1099-SA, Distributions from HSA**
- ☐ **Forms 5498-SA, Contributions to HSA**
- ☐ **Child Care expenses, including school name, address, and EIN number**
- ☐ **529 plan contributions and distributions (1099-Q), Qualified Tuition Program**
- ☐ **Dates and amounts of any estimated tax payments**
- ☐ **Details of any change to dependents; DOB & SSN for new dependents**
 - ☐ **NOTE: For dependents 19-23, please confirm they are a full-time student.**
- ☐ **Please provide any additional tax documents, changes to your contact information, including address, phone number & email (taxpayer and spouse).**

NOTE: Visit [Lockhart & Company | Resources](#) for additional templates and downloads, including Excel spreadsheets for businesses and rental properties.