



**Andrews, Tackett
& Associates, P.S.C.**
CERTIFIED PUBLIC ACCOUNTANTS

Ronald E. Andrews, CPA - Retired
Danny Tackett, CPA

December 15, 2025

To our Valued Clients:

As 2025 comes to a close, I hope all our wonderful clients have a very happy, safe and wonderful Christmas & New Year. Here at ATA, we are gearing up for the 2025 tax filing season. The "One Big Beautiful Bill" gave us a lot of new tax laws to digest, update our software systems and train our amazing staff so that we can provide you with the best service possible in getting your taxes prepared.

The enclosed list has been prepared to assist you in gathering information for your 2025 tax return. We can also provide a client organizer that will show last year's information for your reference. If you would like us to upload an organizer to our secure portal for you please send an email to danny@andrewstackettcpa.com or call the office to request one. If you prefer, one can be printed for you to pick up.

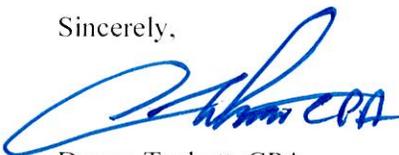
We will begin scheduling appointments soon and anticipate a very busy filing season for 2025. Please get your information to us as early as possible to avoid filing delays and extensions. Any returns delivered to us after April 1, 2026 will likely be extended. Due to ever increasing costs of operation, we will be raising fees this year slightly.

Please remember both spouses **must** sign returns before we can e-file the return. Payment for the return is due at the time of signing; returns that are not paid for will not be e-filed. Please don't ask for an exception.

Don't forget to contact us for an extension: unless requested, we will not automatically prepare an extension for any client as there are simply too many and if we miss someone it can result in penalties and late fees. An extension is of time to file, not time to pay. All tax owed is due to the federal and state governments by April 15th each year or you will incur unavoidable penalties and interest.

Please do not email or text sensitive data to us for tax preparation. We have a secure web portal that we can use to upload your tax data and forms if needed. Please contact our office if you would like to use this service, there is no fee and it is much more secure than e-mail.

Sincerely,



Danny Tackett, CPA

Andrews, Tackett & Associates, PSC

Items to collect for your 2025 taxes

(New clients will need copies of 2023&2024 returns)

1. Wage statements and year end pay stubs Overtime & tips needed (forms W-2)
2. Interest & dividend income statements (forms 1099 int & div)
3. Interest expense for home mortgage loans. (form 1098)
4. Amount paid for real estate taxes. (county sheriff & city clerk)
5. Taxes paid on cars, trucks, campers, boats & motorcycles. (county clerks office)
6. Charitable Contributions for the year. (substantiation is required to deduct)
7. If you have rental property, details regarding rent income and expenses are needed. If you bought or sold any rentals during the year, we need the closing statements.
8. If you have a business, details regarding income and expenses are needed including documentation for unreimbursed mileage (mileage logs & forms 1099-NEC).
9. If you paid estimated taxes, we need details of the amounts paid and dates paid.
10. Any capital gains or losses for the year? Details of the sales of securities are needed.
Selling price and original cost of securities needed along with original date of purchase.
11. Amount paid for medical expenses for the year, including health insurance paid with after-tax dollars. (note the medical limit is 7.5% this year unless you are over 65)
12. Retirement incomes or Social Security statements. Withdraws from 401-k's, IRA's, SIMPLE plans, etc. (forms 1099R or SSA)
13. Dependent care statements from childcare providers **complete with Federal ID #.**
14. Student loan interest statements and educational expense details, ie. Tuition, room & board, computers and supplies. FORM 1098-T FROM THE COLLEGE
15. If you had a new dependent we will need full name, birth date and social security #
16. If you would like us to e-mail you a tax organizer please call the office 836-5335
17. Health Insurance – we must have information on your health insurance including every member of your tax household. If you bought health insurance through the state exchange you will get a form 1095-A. WE MUST HAVE THIS FORM in order to complete your return. You may also get a form 1095-B from your insurance company or a form 1095-C from your employer. PLEASE BRING ALL OF THEM TO US.
18. State income tax departments are requiring driver's license information now so we will need copies of both spouse's driver's licenses.
19. New since 2019 – the IRS is requesting all taxpayers to certify if they made any virtual currency transactions (Bitcoin, Coinbase, etc) if you did, we need information on them
20. If you bought a new car in 2025 you may be able to deduct the interest on that car loan.

Check out our website: Andrewstackettcpa.com