



Wink, Inc.

Wink Tax Services, Inc.

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Specialists in Taxation, Business Formation, Tax Planning & Tax Resolution, Retirement & Social Security Planning.

Tax Appointment Checklist

Call 248-816-1220 to schedule an appointment or schedule online at

<https://bookmeatime.com/winktax> or
www.winktax.com and www.winktax.tax

Secure File & Messaging Portal: <https://verifyfile.com/@winktax>

We offer in person, in office appointments, virtual phone or video appointments and drop office service.

Taxpayer/Dependent Information

- ☐ Last year's tax return (***new client only***)
- ☐ Social Security cards (***new client only***)
- ☐ Social Security cards – new spouse/dependents
- ☐ Driver's license/ID (***new client only***)
- ☐ Death of taxpayer/dependent
- ☐ ***Note any changes:***
 - ☐ Marriage
 - ☐ Divorce
 - ☐ New Dependents
 - ☐ Dependents who have moved out
 - ☐ Address – Moved
 - ☐ Email changes
- ☐ Bank Information for Direct Deposit [Required for returns filed after 9/30/25]

Income

- ☐ Form(s) W-2
 - ☐ Tips received log ***[new for 2025]***
 - ☐ Overtime Log ***[new for 2025]***
 - ☐ Occupation _____
- ☐ Interest Income (Form 1099-INT)
- ☐ Dividend Income (Form 1099-DIV)
- ☐ Prior year state refund amounts
- ☐ Alimony received
- ☐ Business Income and expenses
- ☐ Stock or personal asset sales
- ☐ Sale of a business or business assets
- ☐ IRA distributions (Form 1099-R)
- ☐ Pension/Annuity income (Form 1099-R)

- ☐ Rental property income and expenses
- ☐ Farm income and expenses
- ☐ Unemployment income (Form 1099-G)
- ☐ Social Security Benefits (Form 1099-SSA)
- ☐ Railroad Retirement (Form RRB-1099 (R))
- ☐ Gambling winnings/losses (Form W-2G)
- ☐ Miscellaneous Income (Form 1099-MISC)
- ☐ Non Employee Compensation (Form 1099-NEC)
 - ☐ Tips received **[new for 2025]**
 - ☐ Overtime Log **[new for 2025]**
 - ☐ Occupation _____
- ☐ Payment Card & Third Party Network Transactions (Form 1099-K)
- ☐ Distributions From an HSA, Archer MSA or Medicare Advantage MSA (Form 1099-SA)
- ☐ Refunds of amounts previously deducted, State and Local
- ☐ Schedule K-1

Adjustments to Income

- ☐ Health Savings Account contribution - HSA
- ☐ Moving expenses (military personnel only)
- ☐ SEP, SIMPLE contributions
- ☐ Early withdrawal penalty on savings
- ☐ Health insurance paid for self-employed
- ☐ Alimony paid (amount & SSN of recipient)
- ☐ IRA contributions
- ☐ Student loan interest
- ☐ Classroom supplies (K-12) Educator Expenses

Itemized Deductions

- ☐ Medical expenses (PAID)
 - ☐ After-tax insurance premiums
 - ☐ Hospital/Doctors/Dentists
 - ☐ Long-term insurance premiums
 - ☐ Prescriptions
 - ☐ Hearing aids/batteries
 - ☐ Eyeglasses/contacts/contact solution
 - ☐ Medical mileage
 - ☐ Marketplace Health Insurance **[need 1095-A from the Marketplace Exchange]**
- ☐ Real estate taxes
- ☐ Personal property taxes
- ☐ Home mortgage interest (Form 1098)

- ☐ Auto Loan Interest **[new for 2025]**
 - ☐ Vehicle Assembled in United States
 - ☐ Vehicle Purchased in 2025
 - ☐ VIN # _____
- ☐ Charitable contributions (cash/check)
- ☐ Charitable contributions (noncash)
- ☐ Charitable mileage
- ☐ Casualty losses (Presidentially declared disaster areas)

Health Insurance

- ☐ **Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)**
 - ☐ **Get a copy from the Exchange. Must have this form.**
- ☐ Form 1095-B and/or 1095-C if you had insurance coverage through any other source (i.e. an employer, insurance company, government health plan such as
- ☐ Medicare, Medicaid, CHIP, TRICARE, VA, etc.

Retirement & Other Savings

- ☐ Form 5498-SA showing HSA contributions
- ☐ Form 5498 showing IRA contributions
- ☐ All other 5498 series forms (5498-QA, 5498-ESA)

Credits

- ☐ Child and dependent care expenses
- ☐ Education expenses
 - ☐ Forms 1098T - E - or 1099Q
- ☐ Residential energy expenses
- ☐ Adoption expenses

Taxes Paid

- ☐ Estimated taxes paid (federal and state)
- ☐ Extension payment

Misc. Items

- ☐ First-time homebuyer credit repayment
- ☐ Household employee information
- ☐ Tips received
- ☐ Sale or purchase of a personal residence
- ☐ HUD-1 statement - **home purchase or refinance**
- ☐ Disaster Declaration Federal area _____

