



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://verifyle.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 _____*

Virtual / Digital Asset / Crypto Currency

Yes - *Bought, Sold, Traded or Spent*
 NO – *Did Not use, buy, sell*

Questions regarding Income Tax, Retirement, Social Security, Finances

