



2025 CLIENT HANDOUTS GUIDE

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- Alternative Minimum Tax
- Audits
- Cancellation of Debt - Insolvency
- Capital Gains and Losses
- Charitable Contributions Guide
- Charitable Contributions Noncash FMV Guide
- Charitable Contributions Recordkeeping Requirements
- Clergy - Religious Workers
- Consumer Credit
- Cost Sharing Reduction and the Premium Tax Credit
- Crowdfunding
- Dependent Support Worksheet
- Digital Assets
- Divorce and Taxes
- Education Tax Benefits
- Energy and Vehicle Credits
- Estimated Taxes
- Extending Your Individual Income Tax Return
- **Families With Children***
- Filing Status
- Foreign Bank and Financial Accounts
- Gambling Log
- Health Savings Accounts (HSAs)
- High-Income Taxpayers
- Hobby vs. Business
- Household Employees
- Identity Theft and Your Taxes
- Itemized Deductions - Casualty and Theft Losses
- Itemized Deductions - Homeowners
- Itemized Deductions - Interest Paid
- **Itemized Deductions - Medical Expenses***
- Itemized Deductions - Taxes Paid
- Kiddie Tax
- Like-Kind Exchanges
- Moving Expenses
- Multi-State Taxation
- Sale of a Principal Residence
- Standard vs. Itemized Deduction
- Stock Options - Same Day Sales
- Tax Facts and Figures
- Tax Scams - Protect Yourself
- Taxable Social Security Benefits
- Taxpayers Who Receive an IRS Notice
- Tipped Employees
- Understanding how the IRS Contacts Taxpayers
- What To Do if You Can't Pay Your Taxes
- Withholding - Filling Out Form W-4

BUSINESS



- Business Entity Comparison Chart
- Business Entity Pros and Cons
- Business Expenses Worksheet
- Business Management Tips
- Business Owners - Taking Money Out of a Business
- Business Use of Home
- Buy-Sell Agreements
- Corporation Meeting Requirements
- Daycare Providers Income and Expenses
- **Employee or Independent Contractor***
- Employer Health Insurance Requirement
- Employing Family Members
- Excess Business Loss and Net Operating Loss (NOL)
- Expense Reimbursements for Employees
- Farm Expenses Worksheet
- Farm Income Worksheet
- Farm Inventory and Accounting Methods
- Farm Vehicles and Fuels
- FinCEN Beneficial Ownership Reporting
- Form 1099-K
- Form 1099-MISC and Form 1099-NEC Reporting
- Fringe Benefits
- Inventory Cost of Goods Sold
- Limited Liability Companies (LLCs)
- Mileage and Expense Log
- Partnerships
- Qualified Business Income Deduction
- Real Estate Professionals
- Recordkeeping for Tax Purposes
- Rental Income and Expense Worksheet
- Rental Income and Expenses
- Rental Real Estate QBI Safe Harbor
- Repairs vs. Improvements
- Rideshare Drivers
- S Corporations
- Self-Employment Tax
- Short-Term Rentals
- Small Business Health Care Tax Credit
- Starting a Business
- Vehicles - Business Use

ESTATES & TRUSTS



- Death of a Taxpayer
- Estate Tax (Form 706)
- Gift Tax
- Personal Representatives - Estates

RETIREMENT



- Individual Retirement Accounts - Beneficiaries of IRAs and Qualified Plans
- Individual Retirement Accounts - Kinds of IRAs and Prohibited Transactions
- Individual Retirement Accounts - Qualified Charitable Distribution (QCD)
- Individual Retirement Accounts - Required Minimum Distributions (RMDs)
- Individual Retirement Accounts - Roth IRA Conversions
- Individual Retirement Accounts - Roth IRAs
- Individual Retirement Accounts - Traditional IRAs
- Retirement Income
- Reverse Mortgages
- Saving for Retirement
- Social Security and Medicare

PLANNING



- Early Retirement Distributions - SEPP
- Estate Planning, Wills, Probate, and Transfer of Assets
- Moving Out Worksheet
- Newlyweds Tax Tips
- Pension Income Planning
- Saving for College

ORGANIZERS



- C Corporation Tax Organizer
- General Engagement Letter for Individual Tax Preparation
- **Individual Taxpayer Organizer***
- Individual Taxpayer Organizer - Rental Property
- Individual Taxpayer Organizer - Sole Proprietorship
- LLC Tax Organizer
- Paid Preparer Due Diligence Checklist
- Partnership Tax Organizer
- S Corporation Tax Organizer

NEWSLETTERS



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