



Dear Valued Clients,

Welcome back, everyone — ready or not, tax season has arrived again. We know this isn't anyone's favorite time of year (trust us, we feel it too), but we're genuinely glad to see our returning clients and excited to meet the new ones joining us. To help make things smoother, we've included a brand-new Tax Organizer this year. Please take a few minutes to fill it out before your appointment or drop-off — it helps us work faster, file accurately, and keep the chaos to a minimum for all of us.

Big Changes:

- Final paystub required for each W2 job to verify non-taxable overtime and tips
- New Vehicle Purchases- VIN Eligibility Required
 - If you purchased and are financing a new vehicle in 2025, you must verify the vehicle qualifies
 - [Nhtsa.gov/vin-decoder](https://nhtsa.gov/vin-decoder)
 - Please bring your VIN and interest paid on the vehicle in 2025
- IRS is phasing out paper checks for both refunds and payments. Bank information will soon be required for filing
- This is the final year to claim energy efficient tax credits- windows, doors, solar, etc.

2025 Mileage Rates	Standard Deductions
<ul style="list-style-type: none">• Business 70 cents/mile• Medical 21 cents/mile• Charitable service 14 cents/mile	<ul style="list-style-type: none">• Single or Married Filing Separately \$15,750• Head of Household \$23,625• Married Filing Jointly \$31,500

- ✓ APRIL 15TH, 2026 is the tax filing deadline and extension filing deadline for INDIVIDUALS.
- ✓ MARCH 16TH 2026 is the tax filing deadline for PARTNERSHIPS, CORPORATIONS AND LLC'S TAXED AS A PARTNERSHIP OR CORPORATION. IT IS ALSO DEADLINE FOR THOSE COMPANIES TO FILE EXTENSIONS.
- ✓ Note: When filing an extension, penalties and interest will apply to tax amounts due. Filing an extension is only an extension to File – **Not an extension to pay.**
- ✓ All supporting documents should be brought to your appointment to ensure timely completion of your Tax Return preparation and filing process.
- ✓ **Documents must be dropped off by March 31st or an extension will be filed for you. We cannot guarantee it will be done by the April 15th deadline. We will need a copy of your driver's license for dropped off returns, as well.**

Create an IRS account at [IRS.gov](https://www.irs.gov) to gain quick access to your personal tax data. There, you can access a wide array of tax information.

Campbell's Tax Team

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Please complete all sections that apply and attach supporting documents.

1) Personal & Household Information

☐ Marital status changed in 2024 (Married / Divorced / Widowed) — Date: _____

☐ Dependents changed (new child, shared custody, or no longer dependent). Please provide information.

2) Business / Farm (if applicable)

Provide details for each business and fill out attached expense list or provide P&L. Note any new or closed businesses in 2024.

Business Name _____ EIN _____

Start/Close Dates _____ Principal Business Activity _____

Vehicle Use — Year/Make/Model _____ Date placed in service _____

Total miles (2024) _____ Business miles (2024) _____ Written log? ☐ Yes ☐ No

Subcontractors paid or 1099-NEC issued? ☐ Yes ☐ No | Provide additional info to your preparer.

4) Life Events & Other Items

☐ Bought/sold/refinanced a home (attach closing statement)

☐ Received or paid alimony (pre-2019 decree) \$ _____

☐ Large gifts given/received (over \$17,000)

☐ Inheritance or trust distributions

☐ Natural disaster, casualty, or theft loss

☐ Moved states or worked out of state- Date: _____

☐ Foreign accounts, crypto, or digital assets transactions (attach statements)

5) Documents Checklist — Attach if applicable

☐ Prior-year tax return (if new client)

☐ W-2s, 1099-NEC, 1099-K, 1099-MISC

☐ 1099-INT, 1099-DIV, 1099-B (brokerage statements)

☐ 1099-R, SSA-1099, 1099-G

☐ 1095-A (Marketplace health insurance)

☐ Mortgage 1098, property tax statements

☐ Charitable donation receipts (cash/noncash)

☐ Tuition 1098-T, student loan 1098-E, book/equipment expenses

☐ Child/dependent care statements

☐ Business/rental summaries, mileage logs

☐ Proof of estimated tax payments

DEDUCTIBLE PERSONAL EXPENSES

MEDICAL

(ONLY LIST AMOUNTS NOT PAID BY INSURANCE)

Prescriptions Medicine and Drugs
Doctors, Dentists, Nurses, Hospitals
Premiums for Medical Insurance
Miles Traveled for Medical Care
Glasses, Hearing Aids, etc.

**** MEDICAL MUST BE OVER 7.5% OF YOUR ADJUSTED GROSS INCOME ****

TAXES

State Income Tax Paid
Sales Tax Paid on Purchase Vehicles
Real Estate Taxes
Personal Property Taxes
Other Taxes Paid for Real Estate
Interest paid on new vehicles purchased in 25 (provide VIN)

INTEREST

Home Mortgage Interest Paid to Institute
Home Mortgage Interest Paid to Individual
Name & Address of Individual and SS Number
Points Paid on Home During the Year
Investment Interest Paid (Land, Stocks, Etc.)

CONTRIBUTIONS

Church
(CONTRIBUTIONS OVER \$250 REQUIRE RECEIPT)
Other Cash Contributions
Other Than Cash (Goodwill)
Travel For Charitable Purposes

MISCELLANEOUS DEDUCTIONS

Gambling Expenses If Reported Winnings (**Limited to 90%**)
Unreimbursed Work-Related Expenses, For State Only
Estimated Payments Amounts and Dates Paid

BUSINESS INCOME AND BUSINESS EXPENSES

THE FOLLOWING IS A LIST OF COMMON EXPENSES FOR
SCHEDULE C BUSINESS, FARMS OR RENTAL HOUSES,
S CORPORATIONS, LLC, OR CORPORATION:
 (THIS LIST IS FOR REFERENCE; IT IS NOT MANDATORY)

INCOME		LEGAL/PROFESSIONAL	
ACCOUNTING SERVICES		LICENSES	
ADVERTISING		MEALS	
BANK CHARGES		OFFICE SUPPLIES	
BUSINESS RENT/LEASE		PARKING/TOLLS	
CLEANING/JANITORIAL		PERMITS/FEES	
COMMISSION & FEES		REPAIRS/MAINTENANCE	
CONTRACT LABOR		SECURITY	
COST OF GOODS SOLD		SUPPLIES	
CREDIT CARD FEES		STORAGE	
DUES & SUBSCRIPTIONS		TAXES (FRANCHISE/BUSINESS)	
DELIVERY/FREIGHT/POSTAGE		TELEPHONE	
EQUIPMENT RENTAL		TOOLS	
FUEL		TRAINING/EDUCATION	
GIFTS		TRAVEL EXPENSES	
INTEREST		UNIFORMS	
INTERNET		UTILITIES	
INSURANCE		WAGES – EMPLOYEES	
<ul style="list-style-type: none"> • AUTO • BUSINESS • WORKERS COMP 		WAGES – EMPLOYEE TAX	
		TOTAL BUSINESS MILES	
		TOTAL MILES FOR YEAR	
		VEHICLE (odometer readings)	
ENDING INVENTORY (IF APPLICABLE)		YEAR/MAKE/MODEL BUSINESS VEHICLE	

FARMS ONLY: (THE ABOVE EXPENSES PLUS THOSE LISTED BELOW)

BREEDING FEES		FREIGHT, TRUCKING	
CHEMICALS		FUEL USED ON FARM	
CONSERVATION EXP.		SEEDS, PLANTS PURCHASED	
CUSTOM HIRE		STORAGE, WAREHOUSING	
FEED		VETERINARY FEE, MEDICINE	
FERTILIZER & LIME			

PLEASE LIST EACH ITEM SEPARATELY FOR PURCHASED EQUIPMENT/ASSETS:

EQUIPMENT DESCRIPTION	AMOUNT \$	DATE OF PURCHASE & SALE