

Minar Accounting & Tax
Formerly Vanderziel Tax & Accounting
PO Box 512
Marshall, MN 56258

Ph# 507-532-5762

Income Tax Information - 2025

Only fill out if changed from last year

	<u>Taxpayer</u>	<u>Spouse</u>
Name	_____	_____
Social Security Number	_____	_____
Occupation	_____	_____
Date of Birth	_____	_____
Home Address	_____ City _____ State _____ Zip _____	
Telephone Number	_____	_____
Email Address	_____	_____

Children and Other Dependents (New Dependents only)

<u>Name</u>	<u>Social Security #</u>	<u>Birthdate</u>	<u>Relationship</u>	<u>Gross Income</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Things to Bring - Any "Important Tax Documents" you received including: forms W2, 1099, 1098, 1095, and K-1.

New clients should bring last 1 to 3 years tax returns

Sources of Income

Wages and Salaries (Form W2) - employer

Social Security/Railroad Retirement (SSA-1099)

Unemployment Compensation (1099-G)

Interest and Dividends (1099INT or 1099DIV) -

Payer name, address, and SS# if from an individual

Amount

Pension, IRA, KEOGH, or other retirement plans (1099R)

Gambling winnings (W2G)

Other Income (usually 1099) - tips, prizes, alimony, compensation not on a W2, jury duty, etc...

- Identify and list amounts

Income from Partnerships, S-corp, Estate or Trust (K-1)

Sale of stock and other investments - 1099B, 1099S, Brokerage statement

Sale of other property - provide details

<u>Description</u>	<u>Date Acquired</u>	<u>Date Sold</u>	<u>Sales Price</u>	<u>Selling Expenses</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

List **nontaxable** income - municipal bond interest, worker's comp, disability, etc...

Tax refunds received in 2025

Federal _____

State _____

Tax Payments and Expenses

<u>Est. tax payments made:</u>	<u>Federal Amount</u>	<u>Date</u>	<u>State Amount</u>	<u>Date</u>
4th Quarter, 2024				
1st Quarter, 2025				
2nd Quarter, 2025				
3rd Quarter, 2025				
4th Quarter, 2025				

Retirement Plan Contributions - not reported on a W2. List the amount and date of contributions to the following:

	<u>Taxpayer 1</u>	<u>Date</u>	<u>Taxpayer 2</u>	<u>Date</u>
Traditional IRA				
Roth IRA				
Simple IRA				
SEP IRA				
KEOGH				
If the amount is less than the max allowable, could you contribute more?	Yes		No	
Were you or your spouse covered by any other pension plan?	Yes		No	

HSA plan(1099SA/5498SA) Contributions _____ Distributions _____

Child & dependent care expenses - If you and your spouse are employed or full time students

Were the dependent care services performed in your home?	Yes or No?	
If yes, did you file wage statements with the IRS?	Yes or No?	FICA tax paid _____
Provider or organization to which child care expenses were paid (include cost of preschool):		
<u>Name and Address</u>	<u>ID Number</u>	<u>Amount Paid</u>

<u>Yes</u>	<u>No</u>	<u>Please answer the following questions:</u>	
		Are you, or your spouse if filing jointly, blind?	
		Did you buy or sell, or purchase any items using any digital assets during 2025 (Bitcoin, etc...)?	
		Do you have a financial interest in or authority over any foreign financial account?	
		Did you purchase your health insurance through MNSURE or any exchange? Bring Form 1095-A.	
		Did you have any property losses in a federally declared disaster area?	
		Do any of your dependents have income over \$1,350?	Earned: _____
			Unearned: _____
		Did you pay any alimony in 2025? If yes, amount?	_____
		Social Security number of person receiving alimony:	_____
		Did you receive a letter from the IRS, state, or private collection agency? If yes, bring letter.	
		Do you wish to designate \$3.00 of your taxes to the political campaign fund (no cost to you)?	
		If so, specify party Taxpayer 1 _____ Taxpayer 2 _____	
		Do you receive rental income from residential property?	If yes, have you furnished all of your
		renters with a CRP form? (MN Only)	Yes or No _____
		Did you have any property rented on Airbnb or similar services?	
		If you are a MN renter, please bring your certificate of rent paid (CRP form).	
		If you received homestead credit on property you own, please bring a copy of Property Taxes	
		Payable in 2025. (MN residents only)	
		Did you purchase or refinance a personal residence in 2025? If yes, bring closing statement.	
		Did you pay any adoption expenses in 2025? If yes, furnish details.	
		Did you have any debt forgiven? If so, bring Form 1099-A or 1099-C.	

Personal Itemized Deductions (Schedule A) - May help for Federal and/or State taxes

Medical Expenses (paid):

Health insurance premiums _____
LTC insurance premiums _____
Medicare premiums _____
Prescriptions _____
Doctors, dentists, etc _____
Hospitals _____
Lodging (up to \$50 per night) _____
Medical miles (\$.22/mile) _____
Eye glasses, dentures, etc _____
Drug or alcohol treatment _____
Childbirth classes _____
Weight loss programs _____

Taxes:

State income tax paid _____
Real Estate Tax _____
Licenses: Vehicle 1 _____
Vehicle 2 _____
Vehicle 3 _____
Sales tax paid _____

Interest: Home mortgage bring 1098 form

Paid to a bank _____
Paid to an individual _____
Home improvements _____
Points _____
Investment interest _____
Motor home _____

Contributions: Substantiation required!!

Cash contributions: need receipt or cancelled checks _____

Non-game Wildlife from 2025 tax return _____

Non-cash items: fair market value or garage sale price over
\$500 needs signed statement from donee _____

Travel for volunteer work \$.14/mile
or actual expenses. _____

Casualty or theft losses (State only): Must exceed 10% of
adjusted gross income to be deductible - bring details _____

Miscellaneous Deductions (State only)

Union Dues _____
Professional dues/licenses _____
Tools of the trade for work _____
Uniforms: cost or cleaning _____
Vocational supplies _____
Professional publications _____
Tax Prep fee _____
Safety equipment for work _____
Job related education _____
for travel expenses see page 4
Job search _____
for travel expenses see page 4
Investment expenses _____
IRA, KEOGH fees _____

Other personal deductions you have questions about: _____

Car and light duty truck expenses if vehicle was used for business or work.

Bring in the purchase or sales

agreement in the year of purchase or trade. If the vehicle is leased, bring in a copy of the lease agreement for the first year of the lease. If you take expenses on the standard mileage basis (\$.67)

complete lines 1-9. If the deduction is based on actual expenses or you are unsure, complete lines 1-13. Please sign on the line below to certify this information is correct and complete to the best of your knowledge.

	Vehicle 1	Vehicle 2	Vehicle 3
1. Year and make of vehicle	_____	_____	_____
2. Date purchased	_____	_____	_____
3. Ending odometer reading (12/31/24)	_____	_____	_____
4. Beginning odometer reading (1/1/24)	_____	_____	_____
5. Total miles (line 3 - line 4)	_____	_____	_____
6. Total business miles included in line 5	_____	_____	_____
7. Parking and fees	_____	_____	_____
8. Licenses	_____	_____	_____
9. Interest	_____	_____	_____
10. Gasoline, oil, and lube	_____	_____	_____
11. Repairs, maintenance, and supplies	_____	_____	_____
12. Insurance	_____	_____	_____
13. Other expenses for vehicle	_____	_____	_____

I certify that this information is correct. Please sign.

Travel away from home - must be job related to be deductible (MN only).

The standard meal allowance for 2025

is \$59/day through September and \$68/day October through December. For persons in the transportation industry it is \$69 per day through September and \$80/day October through December.

Different amounts are used for high cost areas. Please provide details.

Nights away from home for business purposes

Partial days away from home (1st/last day of trip):

Airplane, bus, train, cabs

Auto Rental

Convention Fees

Lodging

Laundry and cleaning

Meals and tips (actual expenses)

Other travel expenses (specify)

Use the space below for any other questions that you may have for us.

