

Jamie J. Standinger CPA, P.C.

Income Tax & Accounting

Hayfield

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Dodge Center

PO Box 245 -34 W. Main St.
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Stewartville

200 South Main St.
Stewartville, MN 55976
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Chatfield

16 2nd Street SE
Chatfield, MN 55923
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December 26, 2025

Another tax season is just around the corner and our Tax Preparers have been busy educating themselves on all of the new tax changes for the 2025 and the upcoming 2026 year. Any questions you have regarding the new tax bill, please bring those with you to your meeting and your tax preparer will answer your questions.

Coltan Ness is in his second year with us and is doing a great job! He will be taking appointments this year in Stewartville and Hayfield. When you call to make your appointment, we will make sure you get put with the right tax preparer. We will also be transitioning Sharon's clients to Coltan as well this year. She will be meeting with clients and working with Coltan on finishing the tax return. Next year your appointment will be with Coltan.

Our calendars are set up and we are ready for the calls to come in! We recommend calling in early to get the date and time you want. If you feel more comfortable dropping off your tax information you may do so at any of our locations once you have received all of your paperwork. Chatfield clients: Please continue to drop off your tax information as you have done in the past. If you do need to see a tax preparer or have any questions, please call our Chatfield Office to speak to someone for assistance.

We have our usual list of items to bring into your tax appointment attached with this letter, however here are some other reminders:

- Please double check your W2 if you worked qualified paid overtime, if it is not listed on there and you did not get a separate paper with the amount, please bring in your last paystub for the 2025 year.
- **All payments and refunds this year will need to be electronic, please bring in a voided check or have your banking account information to give to your tax preparer.**
- If you have a small business or rental property, we can provide you with a separate checklist for those activities.
- Cryptocurrency activities continue to cause major tax problems for people that believe it is not reportable. It is taxable, is reportable, and carries incredible penalties for not reporting, so make sure to discuss this with us as well.
- If you installed a new furnace, A/C, boiler, heat pump, water heater, woodstove, windows, doors, insulation, solar or battery storage please be sure to provide us with a copy of the invoice. This is the last year that the credit can be taken.
- If you purchased a new 2025 vehicle and have a loan on it, the interest MAY be deductible. Please provide invoice and dealer paperwork

As always, we have appreciated your business in the past and look forward to meeting your tax, accounting and payroll needs this year and for many years to come.

Sincerely,
Jay Standinger and Staff

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The following is our “normal” list of things to bring to your appointment (this is **not** an all-inclusive list, but should cover what will be needed for most people):

- Social Security Numbers and dates of birth for new dependents.
- W2 form
- W-2G for gambling
- 1099 forms for social security, unemployment, interest, dividends, retirement, misc. income, etc.
- 1099-K form received for selling on Venmo, Etsy, eBay, etc.
- Health Insurance Forms - we only need the form 1095-A if you purchased health insurance through the marketplace.
- Property tax statements. (**Especially if you have not already filed for a property tax refund**).
- Form 1098 for mortgage interest.
- Year-end statements from mutual funds.
- Purchase/sale information for any stocks sold (date purchased/sold & cost basis).
- Child care provider information, name, address, SS#, amount paid. IF the Dependent Care Benefit is offered to you through your employer, please let your tax preparer know if you participate.
- 1098T for college tuition...we **must** see the form
- Student loan interest 1098E.
- Contributions made to any 529 plans for MN Credit (Amount, name of Financial Institution and Acct #)
- Record of estimated taxes paid and when paid.
- Adoption costs (if applicable).
- Details of non-cash contributions (you must have proof i.e., pictures etc.)
- Amount of cash contributions for which you have receipts
- Any out-of-pocket expenses and mileage for volunteer work
- Any cancellation of debt transactions (if applicable)
- Auto License Tabs
- If you have Long Term Care Insurance we need premiums, policy #, and company name (for MN only)
- K1's from partnerships, S-Corps, Estates, or trusts.
- Detailed Income and Expenses for small businesses and rental properties you own
- Farmers & business owners: because of changes in the depreciation rules, we will need ALL INVOICES for equipment purchases made in 2025 to properly complete the depreciation schedules.
- **Please remember it is *your responsibility* to provide us with all information necessary to complete your return.**

If you would like an organizer, please check our website at www.standingertax.com and follow the links. If you do not have access to the internet, you may call one of our offices and they will gladly mail one to you. If you have a question on a particular item, please do not hesitate to contact us.