

Don't Leave the "Beautiful" Money Behind!

New Documents You Need for the
2026 Big Beautiful Bill Changes

The "Big Beautiful" Document Checklist

For the New Car Deduction

- **2025 Year-End Loan Statement:** Must show the total interest paid.
- **Your VIN Number:** Found on your dashboard or driver-side door sticker. *(Tip: Take a photo of the sticker inside your driver-side door!)*

Digna's Tip: The car must be new (2025/2026) and assembled in the USA. If you aren't sure, bring the VIN and we will check for you!

For Overtime & Tips

- **Final 2025 Pay Stub:** Needed to calculate your tax-free "Premium" pay.

Digna's Tip: Many W2s won't separate your "Premium" overtime pay. This stub shows your YTD totals so we can get you the deduction. Bringing your stub allows us to do the "detective work" to lower your taxable income.

- **Tip Records:** Any logs or summaries of your 2025 tips.

Digna's Tip: We can now adjust your income by up to \$25,000 for tips, but we need to prove they were voluntary and separate from your base salary.

For Homeowners

- **Energy/Solar Proof:** Activation certificate dated before Dec 31, 2025.

Digna's Tip: These credits are expiring! We must prove they were active by Dec 31, 2025.

- **Property Tax/Sales Tax Receipts:** The limit jumped from \$10k to \$40k!

For Seniors

- **Senior ID:** If you turned 65 in 2025, you qualify for the new \$6,000 bonus.

Digna's Tip: This is an additional \$6,000 deduction on top of your standard deduction. If both you and your spouse are 65+, that's a \$12,000 total bonus for the household! Make sure to bring IDs for both of you.

The "At-A-Glance" Strategy Sheet


2024 vs. 2025: What Changed?

Item	2024	2025
Standard Deduction (Joint)	\$29,200	\$31,500 (Bigger!)
SALT Limit (Property/Sales Tax)	\$10,000	\$40,000 (Huge Change!)
Child Tax Credit	\$2,000	\$2,200
Overtime Tax	Fully Taxed	Exclusion up to \$12,500

Digna's Quick Calculation Tips

The Overtime Trick: To see if it's worth it, look at your pay stub. If your overtime "premium" (the extra half-time) is over \$500 for the year, you definitely want us to file the new Schedule 1-A for you.

The Itemization Test: Add your mortgage interest + your property taxes. If that number is over \$31,500 (Married) or \$15,750 (Single), we should itemize this year because of the new SALT limits!

 **Don't guess! If you aren't sure about a document, just bring it. It's better to have it and not need it than to miss a deduction!**

Ready to win this tax season?

Now that you have your documents, let's get you on the calendar!

Whether you want to meet from your couch or visit us in Orlando, we're ready for you.

- **Step 1: Schedule your [Virtual Appointment] (Starts Jan 19)**
- **Step 2: Upload your documents to our Secure Online Portal.**
- **Step 3: Prefer in-person? Book your Orlando Office Visit (Starts Jan 28).**

[BOOK MY APPOINTMENT NOW](#)

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