

# John E. Martell

## Income Tax and Accounting Services

This office provides :  
**Personal / Business**  
**Inheritance / Corporate**  
**Tax Preparation**  
**& Accounting Services**

Personal tax return "what to bring" check-list is on back of this page.

Business or Rental property check-list

and other helpful information can be obtained on my website :

**www.johnemartell.com**

call for an appointment

**215-752-7990**

email : [djmartell@aol.com](mailto:djmartell@aol.com)

**Deadline for filing your 2025 personal tax return is**

**Wednesday April 15, 2026**

**2025 was insane ! We hope it was a good year for your family!**

**THIS OFFICE WILL BE PREPARING TAX RETURNS.**

**Your choice : "appointment in office", "drop off", or "mail in"**

**For additional information if you are not sure what to do - call the office.**

( tax prep fees will be added if this office has to acquire, print, or wait for your tax documents )

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### **HIGHLIGHTS OF WHAT IS NEW FOR 2025 ( non business )**

Your total income will impact which of the new laws will help you. Improved opportunity to deduct state/local taxes / deduct loan interest paid on American made qualified vehicle purchased in 2025 / possibility of not paying federal taxes on Social Security, overtime premium earnings, or tip income.

Increased charitable deduction options. Child tax credit increased. Standard deduction and Earned Income Tax Credit increased to name a few.

Other tax law changes, presented on the news, are for 2026 - not 2025

**If you purchased health insurance through The Market Place you must bring the Form 1095-A. Can't find it? Contact The Market Place.**

**Did you have a Health or Medical Savings Account ( HSA / MSA ) ?**

If Yes ? **Make sure you bring ALL the Form 1099-SA's related to each account.**

This form will indicate the dollar amount distributed in 2025. This information must be listed on your return. Your provider will have the form you need.

**If you sold stock, assets, or received \$ amounts from investments,**  
**you must report the capital gain / loss.**

If Yes ? **Bring ALL the Form 1099-B's** related to each of your accounts. You will need to know what you paid for the items you sold. Your broker can provide you with the **COST BASIS / average cost basis** as required to determine any taxable income. Check with your broker/investment company to make sure you have all documents.

**Did any person listed on your tax return attend college or trade school ?**

If Yes ? **Bring ALL the Form 1098-T's.**

You will also need to know the cost of books, etc. for each person claiming this Educational Credit. The Educational Credit can only be deducted on the return that claimed the student.

**Get the Form 1098-T from the student.**

**Langhorne Office :**

**460 E Lincoln Hwy**

**Langhorne Pa**

**19047**

( North of Pennel Boro  
South of Team Toyota  
on Business Route 1 )

Poconos :

27 Hopkins Circle

Albrightsville Pa 18210

570-722-2077

scheduled to be in Poconos :

Sundays

February 1st

February 15th - March 1st

March 16th - March 29th

Pa residents can deduct on Pa return :  
cost of work related : union dues,  
uniforms, tools, etc. You will need  
to know \$ amounts for each expense.

If required to download your  
W-2's, be sure to download all  
copies. Sometimes, information  
is needed from 2nd & 3rd pages.

**You can monitor your personal  
IRS tax account by keeping  
track of payments and  
taxes owed by logging on to :**  
**IRS.gov/account**

