

Checklist

Name:

SSN:

Checklist

INDIVIDUAL YEAR-END CHECKLIST

This checklist is provided to help you gather necessary information for us to prepare your 2024 income tax return. Return this list, along with the supporting documentation, to our office and let us know of any significant changes from your 2023 tax year.

Income Items

- ☐ Wages (Form W-2)
- ☐ Gambling Income (Form W2-G)
- ☐ IRA Distributions, Pensions, and Annuities (Form 1099-R)
- ☐ Dividends (Form 1099-DIV)
- ☐ Interest (Form 1099-INT)
- ☐ Miscellaneous Income (Form 1099-MISC)
- ☐ Nonemployee Compensation (Form 1099-NEC)
- ☐ State and City Refunds and Other Government Payments (Form 1099-G)
- ☐ Credit Card, Debit Card, and Third-party Network Transactions (Form 1099-K)
- ☐ Social Security Benefits (Form SSA-1099)
- ☐ Railroad Retirement Benefits (Form RRB-1099)
- ☐ Partnerships, S Corporations, Estates, and Trusts (Schedule K-1)
- ☐ Brokerage Transactions and Disposition of Capital Assets (Form 1099-B)
- ☐ Proceeds from Real Estate Transactions (Form 1099-S)
- ☐ Self-employed Income (Schedule C)
- ☐ Farm Income (Schedule F)
- ☐ Farm Rental Income (Form 4835)
- ☐ Rent and Royalty Income (Schedule E)
- ☐ Other Income (provide supporting documentation for income received for the following items) - Alimony received, sale of assets or property, cancellation of debt, crypto-currency, other income

Payments (provide supporting documentation for payments made for the following items)

- ☐ Educator classroom expenses
- ☐ Employee business expenses
- ☐ Contributions to a Health Savings Account
- ☐ Expenses related to work relocation with the military
- ☐ Alimony
- ☐ Student loan interest
- ☐ Tuition and fees for higher education
- ☐ Expenses related to child or dependent care
- ☐ Contributions to a Retirement Savings Account
- ☐ Other payments _____

Itemized Deductions (Schedule A):

- ☐ Medical and dental expenses
- ☐ Real estate taxes
- ☐ Other state and local taxes
- ☐ Mortgage interest
- ☐ Investment interest
- ☐ Charitable contributions - Must have receipts (charitable contributions \$250.00 and over require a receipt from the organization)
- ☐ Noncash contributions
- ☐ Unreimbursed employee expenses
- ☐ Gambling losses

Other Items

- ☐ Federal & State estimated taxes paid (amounts & dates)
- ☐ IRA, SEP, & Keogh contributions
- ☐ Dealer's certification for new or used electric vehicles
- ☐ Receipts and/or manufacturer's certifications for personal residence energy improvement.
- ☐ Form 1095-A or proof of health insurance coverage