

Checklist For Having Your Income Taxes Professionally Prepared By:

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Personal Information

Social Security Numbers, D.O.B.s, DL No. - Iss. - Exp.

- Yours
 - Spouse's
 - Dependents
- see note *

Child Care Expenses

- Care Provider's name
- Care Provider's address
- Care Provider's Tax ID or SSN
- Cancelled checks, receipts, or invoice

Adoption Expenses

- Legal Fees
- Transportation & Other costs

Education Expenses

- Form 1098-T tuition statement
- Cancelled checks, receipts, or invoice for post-HS education

Bank Information (for direct deposit of refund)

- Bank routing number (RTN)
 - Your account number
 - Account type (checking or savings)
- see note *

Other

- Federal, State, or Local Estimated Taxes Paid for 2024

[NOTES]

* We have this info if we prepared your 2023 tax return. Note any changes below.

T PHONE:

S PHONE:

Income

- Your W-2s
- Spouse's W-2s
- Interest income Form 1099-INT
- Dividend income Form 1099-DIV
- Social Security Benefits Form SSA-1099
- Unemployment income Form 1099-G
- Gambling and Lottery Winnings Form W-2G ¹
- State or Local Tax Refund Form 1099-G ²
- IRA or Pension distributions Form 1099-R
- Income from Partnership or Corporation K-1
- Prizes and Awards Form 1099-MISC
- Self-Employment or Rental Income Form 1099-MISC ^{2,3}
- Health Savings Account distributions Form 1099-HSA
- Proceeds from sale of stocks, bonds, etc Form 1099-B
- Proof of cost basis for any stocks, bonds, etc sold
- Jury Duty pay records
- Alimony received

¹ receipts for gambling purchases may be used as an itemized deduction to offset gambling winnings

² this income is not always reported on a Form 1099; verify from your records instead

³ expenses related to Self-Employment or Rental Income may be used to offset this income

Adjustments and Deductions

- IRA/SEP Contribution for You/Spouse
- Health Savings Account Contribution for You/Spouse
- Self-Employed Health Insurance premiums paid
- Alimony Paid
- Student Loan Interest Form 1098-E
- Penalty on Early Savings Withdrawal
- Educator Expenses (for educators)

Medical and Dental Expenses

- Unreimbursed Medical/Dental bills, including Rx drugs
- Mileage Records for medical/dental visits
- Out-of-pocket insurance premiums paid

Taxes Paid

- Amount Due from last year's State and Local returns
- Real Estate Taxes on your main and vacation home
- Personal Property taxes paid
- Automobile licensing fees (if based on vehicle value)

Interest Paid

- Mortgage Interest on main/vacation home Form 1098
- Points paid on home purchase in 2024
- Proration of points paid on refinance
- Investment Interest Expense from brokerage statement

Charitable Contributions

- Cancelled checks/charity bills/receipts for cash donations
- Records of mileage incurred for charitable purposes
- Receipts for date/description/value of donated property



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