

Tax checklist (tax year 2024)

Personal information (for you, your spouse, and dependents)

- SSNs or ITINs, full names and dates of birth, addresses, telephone numbers and email addresses
- Bank account and routing numbers if you would like a direct deposit
- Amount of alimony paid, ex-spouse's SSN and date of divorce agreement
- Childcare provider records (including the provider's ID number) if applicable
- Copy of your 2023 tax return
- Copy of your 2022 and 2021 returns if you wish to have them reviewed
- Any tax notices received from the IRS or other taxing authorities

Income (investments, retirement, and business)

- All forms such as SSA-1099, W-2, 1098, 1099, or Schedule K-1
- Sale/purchase date and total investment in any stocks, cryptocurrency or property you sold
- Closing documents pertaining to real estate transactions - including sale documents for real estate sold in 2024
- Any contributions that you made to IRAs, retirement plans, and HSAs
- Records of business income and expenses if you are an independent contractor, self-employed, or own rental real estate (if you received 1099-NEC, you are considered self-employed). See our checklists for the *Self-employed*, *Business use of home*, *Business use of vehicle*, and *Rental properties*. Your income and expenses should be totalled and categorized for the whole year.

Education

- Education scholarships and fellowships or student loan interest paid
- Records of tuition and other higher education expenses, and form 1098-T

Itemized deductions and tax credits

- To help with organizing the following deductions, we have created an *Itemized deductions* checklist
- Cost of healthcare (medical, dental or vision) or long-term care insurance and healthcare expenses (doctors' visits, prescriptions and medical miles)
- Forms 1098 (mortgage interest)
- Real estate and personal property tax records /cost and date of energy efficiency improvements for tax credits
- Amount of state/local income tax paid in addition to withheld taxes
- Records of donations to church and other charities
- Records of non-cash charitable donations, i.e. donations to Goodwill, etc.
- Childcare provider statement showing their EIN, address and amount paid per child
- Records of hurricane losses including original costs, repair estimates and receipts and insurance or FEMA reimbursement (see our *Hurricane losses* checklist)
- Energy efficiency improvements to your home (see Energy Star website www.energystar.gov for qualifying items)

Healthcare

- Form 1095-A, if you enrolled in an insured plan through the Marketplace (Obamacare)
- HSA information (Forms 5498, 1099-SA)

Disclosures

- Did you have more than \$10,000 in a foreign bank/investment account or have any financial interest in a foreign trust?
- Did you own and sell or exchange any virtual/crypto currency in 2024?

Would you like a detailed tax organizer?

Returning clients: contact us if you would like a detailed tax organizer containing last year's information

New clients: a fillable detailed organizer can be found on the Resources page of our website

