



## 2024 TAX RETURN CHECKLIST

- Client Name \_\_\_\_\_
- Preferred Phone # to contact you \_\_\_\_\_
- Email address \_\_\_\_\_
- What address should we have on the tax return?  
Street Address \_\_\_\_\_  
City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_
- Should our billing go to the same address? YES \_\_\_\_\_ NO \_\_\_\_\_
- Has your marital status changed during the past year? YES \_\_\_\_\_ NO \_\_\_\_\_  
If yes, please explain. \_\_\_\_\_
- Were any children added to your family in 2024? YES \_\_\_\_\_ NO \_\_\_\_\_  
If so, what is the child's name? \_\_\_\_\_ Date of birth \_\_\_\_\_  
Child's social security number \_\_\_\_\_
- Has your bank information changed? YES \_\_\_\_\_ NO \_\_\_\_\_  
If yes: Routing number \_\_\_\_\_ Account number \_\_\_\_\_  
Name of bank \_\_\_\_\_ Checking or Savings? \_\_\_\_\_
- Have you been issued an identity protection PIN by the IRS? YES \_\_\_\_\_ NO \_\_\_\_\_  
If yes, we need the letter containing the PIN sent to you by the IRS
- Did you receive a Form 1095 healthcare form from the IRS? YES \_\_\_\_\_ NO \_\_\_\_\_  
If yes, please provide us a copy of it.
- Do you want a paper copy of your 2024 return? YES \_\_\_\_\_ NO \_\_\_\_\_

**PLEASE FILL OUT THIS FORM AND RETURN TO OUR OFFICE  
WITH YOUR 2024 TAX DOCUMENTS**

## TAX DOCUMENTS CHECKLIST

Please look over the income and expense data listed here to see which ones may apply to you.

<b>W-2s</b>	Wages Gambling
<b>1099s</b>	Interest Income Dividend Income Retirement/IRA Income Social Security Income Nonemployee Compensation (Business) Rental Income Royalty Income (Oil & Gas) Stock Sales Real Estate Sales (include Closing Statement)
<b>1095-A</b> <b>1098-T</b> <b>1099-SA</b>	Health Insurance Credits Education Expenses HSA Distributions
<b>Business Income</b>	Schedule of Income & Expense
<b>Rental Income</b>	Schedule of Income & Expense
<b>Schedule K-1</b>	Partnerships S-Corporations Trusts/Estates
<b>Medical Expenses</b>	Doctors Dentist Hospital Medicine - Pharmacies can provide you with a list of all your prescriptions for the year
<b>Property Tax Payments</b>	
<b>Mortgage Interest Statements</b>	
<b>Charitable Contributions</b>	Cash Household items (Goodwill, Salvation Army)
<b>Child Care Expenses</b>	
<b>Retirement Plan Contributions</b>	IRA Roth
<b>Estimated Tax Payments</b>	Amounts & dates paid