

Financial Solutions For A Changing World

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2024 Tax Organizer Checklist

| Personal Information | Adjustments, Deductions & Credits |
|--|---|
| Name, DOB and SSN for any new dependents | IRA, SEP contributions |
| Copy of Drivers' License (front & back), if <u>renewed</u> in 2024 | Medical Expenses (including premiums & travel) |
| Bank account & routing number for direct deposit/payments | 1098 Form - Mortgage Interest |
| Estimated payments made in 2024 | Property Taxes Paid |
| | Charitable Donations - Include amounts, dates and documents. |
| | Rental Property expenses (including improvements) |
| Sources of Income | Business Expenses (including equipment and asset purchases) |
| W-2 Forms | 1098-T - College Tuition Paid - Include room, board, books etc. |
| 1099-R Forms | 1098-E - Student Loan Interest |
| 1099 Forms (INT, DIV, MISC, NEC, Capital Gains) | Dependent Child Care - Provider name, address, tax ID & amount |
| Self-Employment Income | Energy Efficient Purchases (Solar, Electric Vehicle, Windows, etc.) |
| Unemployment Income (1099-G) obtain form online | Other Information |
| Social Security | You must report Foreign Bank Accounts & Income |
| Rental Property | You must report Cryptocurrency transactions |
| Alimony Received | 1095-A - Healthcare coverage and amounts |
| State Refunds | Ŭ |
| W2-G - Gambling | |
| 1099-C | |
| K1 Form - Partnership, S-Corp or Trust/Estate Income | |
| 1099-S - Real Property Sale | |
| 1099-Q Forms | |

<u>Note</u>: This list is meant to be guide as you gather the relevant information to assist us in accurately preparing your tax return. If you have any one-time or unusual transactions that may have tax consequences, please include that information in your submission of documents to us.

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