

Financial Solutions For A Changing World

1249 Pleasantville Road Briarcliff Manor, NY 10510 Phone: 914-762-4760 Fax: 914-762-6320 www.hudsonfs.com

## 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.

Securities and advisory services offered through Cetera Advisor Networks, LLC, member FINRA/SIPC, a broker/dealer and Registered Investment Adviser. Cetera is under separate ownership from any other named entity. Tax planning services through Hudson Tax Services, LLC, are separate from Cetera Advisor Networks, LLC, which does not provide tax or legal advice.