



Tax 2024 CHECKLIST



Please use this checklist as your guidelines and send us all the documents that apply to your Tax filing.

BASIC INFO/SOURCE OF INCOME

- All Your W2s (including your spouse)
- 1095-A or 1095-B or 1095-C (Medical document if you have one)
- 1095-HC if you are from Massachusetts
- Valid Driver License or State ID's
- Last Year Tax Copy (if you are new client)
- Client Work sheet (Request for worksheet)

INTEREST/DIVIDEND/STOCKS

- 1099-INT - Interest Income Form
- 1099-DIV - Dividend Income Form
- 1099-B-Sale of Stock
- Stock Supplemental information (if you have company stocks)
- Transactions involving cryptocurrency.
- 1099-SA-Health Savings Account
- 1099-R-Pension/IRA

OTHER INCOME

- 1099 NEC
- Gambling Income/Loss
- All Worldwide Income
- Unemployment - 1099-G
- Payment Card and Third-party network transactions – 1099-K
- Sale of property – 1099-S

DEDUCTIONS

- 1098-T (Tuition Form)
- Childcare payment receipts with provider's name and EIN number
- Charity receipts
- DMV fees

MORTGAGE DOCUMENTS

- 1098 Mortgage Interest Statements
- Real Estate property tax record

OTHER DEDUCTIONS

- Solar Credit - Invoice
- EV Credit – The dealership should give you IRS Form 15400, showing any credit received

SELF EMPLOYMENT & RENTAL

- 1099 MISC (Request for worksheet)
- Schedule K-1
- Rental Property (Request for worksheet)