

2024 INDIVIDUAL TAX RETURN PREPARATION CHECKLIST

*****This is not a comprehensive list. If you have additional documents that need to be included, please submit them.*****

- **SIGNED ENGAGEMENT LETTER (We cannot prepare your tax return without one on file)**
- Copy of previous year's tax return (**NEW CLIENTS ONLY**)
- Tax preparation fees paid in prior year (**NEW CLIENTS ONLY**)
- Social security number(s) and date of birth of everyone who will be listed on the tax return (**NEW CLIENTS ONLY**). We also need copies of Social Security Cards.
- Driver's license – COPY – **NEW CLIENTS ONLY**
- Did you and your dependents have health care coverage for the full year? If yes, please include **Forms 1095-A for Marketplace policies, and 1095-B or 1095-C from an employer.**
- Notice CP01 A with **IP PIN** if victim of identity theft
- Current address and/or a new mailing address
- Marital or filing status changes as of 12/31/2024
- Changes in dependents during tax year
- List any non-child dependents
- Social security number(s) & dates of birth of child or children born during tax year, including copies of Social Security cards.
- Did any of your dependents have unearned income of \$1100 or more (\$350 if self-employed)
- Child care expenses
 - Name, address & federal ID number of provider
 - Total amount paid for *each* child
 - And/or for multiple providers, provide the amount paid to each provider for the year
- **All W-2s, 1099-Miscellaneous forms** and documentation of any other income for taxpayer and spouse/legal partner
- Unemployment Compensation (**1099-G**)
- Social Security annual statements (**1099-SSA Statements**)
- IRA, Roth IRA, or other retirement plan contribution or distribution forms (**1099-R and 5498 Forms**)
- **Are you paying back any 401 K withdrawals or loans due to COVID-19 related hardship?**
- Roth IRA Conversions documentation (**1099-R and 5498 Forms**)
- Brokerage statements showing security sales, dividends & interest (**1099-INT, 1099-DIV, and 1099-B Forms and statements**).
- Digital Assets (Include any related statements, i.e, virtual currencies, non-fungible tokens, virtual real estate and similar assets).
- **During this year, did you have any securities that become worthless?**
- Gambling Winnings and Losses (**Forms W2-G for certain winnings**)
- Health Savings Accounts Contributions or Distributions (**Forms 1099-SA and 5498-SA**)
- Tuition statements from College or University and amount paid for course-related expenses (tuition, books, student activity fees, college tax ID#), including any **Forms 1098-T and 1099-Q** received.
- **529 Plan** disbursements to pay for qualified elementary, secondary, and college expenses.
- **529 Plan** contributions (Indiana based 529 account(s) number and contribution amounts per child)
- Private school tuition or Home- Schooling expenses

- Student loan interest statement
- Rental income & expenses (**Schedule E filers**). Please provide information for each property separately.
- Self-employment income & expenses summary (**Schedule C filers**) – (1099-NEC and 1099-K Forms)
- Did you receive a Form 1099-K for the sale of personal items or in error?
- Farm income and expenses (**Schedule F filers**)
- Statutory employees. Please provide business expenses.
- **Home office deduction consideration IF operating a business from home or Self-employed.**
- K-1 forms if you are a partner or shareholder in a business, real estate entity, or trust.
- Mortgage interest 1098 and real estate tax statements (**Form 1099-S, closing statements if a new or refinanced mortgage**)
- **Home equity line of credit interest statements. Please provide receipts for home- related repairs or improvements.**
- **GREEN ENERGY:**
- Any energy improvements to your home (doors, windows, geothermal system, solar panels, insulation, electric panels upgrade, home energy audits, etc...)
- Did you purchase a new or used clean energy vehicle? If yes, provide the purchase invoice.
- Moving expenses (Military moves only)
- Medical expenses (*if near 7.5% of your Adjusted Gross Income*)
- Cash and non-cash charitable contributions (**ALL contributions must have receipts – Donations over \$250 must have acknowledgment letter from organization**)
- Excise tax paid on your license plate registrations and donations for specialty plates
- Quarterly estimated tax payments (**Federal and State**), please include date of payment
- Total rent paid in Indiana
 - **Landlord name and address**
 - **Number of months paid and amount**
 - **Address where you rented during 2024, if it's not your current address**
- Long term care insurance paid – Indiana partnership (Include a copy of the front page of policy or the declaration page)
- If relocated to or from Indiana, please provide date of move.
- **VOIDED CHECK for direct deposit in case you are getting a refund**
- **Please list any additional INFORMATION, questions or concerns you might have.**

FOR SELF- EMPLOYED TAXPAYERS, PLEASE DO NOT BRING A BOX OF RECEIPTS. WE NEED YEAR- END TOTALS OF INCOME AND EXPENSES ONLY. TOTALING OF RECEIPTS WILL INCUR EXTRA FEES. LET US KNOW IF YOU NEED BOOKKEEPING ASSISTANCE.