

APPOINTMENT CHECKLIST

PLEASE READ CAREFULLY

Missing / incomplete documentation may result in our inability to complete your return

- Completed [Intake & Interview](#) sheet Form (13614-C); if online must be printed
Do not enter information in gray areas of the form
- All Taxpayers must be present, one return per appointment,
(if married, spouse must be present)
- Bring Last year's tax return. 2022 if no 2023 filed
- Social Security card for all taxpayers and dependents, and Photo ID
- If you bought insurance through the marketplace, bring Form 1095A
- 2024 Identity Protection PIN for each individual if applicable
- **Voided Check Required** if you want direct deposit

Income – Remove all items from envelopes

- Wages W2's and other income
- 1099-INT Interest on Bank accounts & CD's
- 1099-DIV Dividends from Stock, Mutual Funds
- 1099-B Proceeds from Stock or Mutual Fund Sales – bring all pages
* **Note:** Brokerage Statements **must** have sub-totals for Short Term vs Long Term transactions for both Sales Proceeds and Cost. Cost basis is needed.
- 1099-R IRA / 401K Distributions or Pension Payments
- SSA-1099 Social Security benefits or RRB-1099 Railroad Retirement benefits
- Self Employed Business - Income, expenses, mileage
- 1099-G Unemployment Compensation
- Other – Alimony, Jury Duty, Election Judge, Lottery winnings, 1099-K

Deductions

- Medical (out of pocket not covered by insurance)
SUMMARIZE ON REVERSE SIDE OF PAGE
- Charity
SUMMARIZE ON REVERSE SIDE OF PAGE
- Taxes
 - Real Estate Tax Bill
 - 1098 Mortgage interest Statement
 - Other big tax item (auto purchase)

Payments

- Carryover of refund from prior year tax return
- Estimated tax payments

Other Misc Documents

- 1098-T Education expenses, Tuition, Fees & Books
- 1098-E Student Loan interest
- 1099-SA forms showing distributions from health savings accounts
- 1099-LTC forms to document long term care benefits
- IRA Contributions (Other than on W-2's)
- Dependent care: Provider, ID and amounts paid
- Energy efficient home improvements – Bring receipts and Manufacturer's certifications
- Any other tax forms or communications received during 2024.

SEE REVERSE SIDE

2024 EXPENSES

If you have a substantial amount of deductions, you may want to itemize. If so, please complete the below line items

MEDICAL EXPENSE DETAIL (out of pocket not covered by insurance)

Insurance

Medicare	_____	Social Security Stmt
Other Medical Ins	_____	
Prescriptions Ins	_____	
Dental / Vision Ins	_____	

Doctors / Dentist _____

Prescriptions _____

Labs, X-Rays _____

Hospital Care _____

Medical Aids

hearing aids, crutches, wheelchairs _____

Other medical – LIST

Long Term Care Insurance _____ Taxpayer

_____ Spouse

Medical Miles _____

CHARITABLE CONTRIBUTIONS

Cash / Check / Credit Card _____

Non-Cash Contributions

Not exceeding \$500 _____

***** NOTE:** Due to site limitations, we will not be able to complete a return with non-cash contributions exceeding \$500.