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Tax Preparation & Deduction Checklist 2024

Income

1. W-2 Forms – Wages, Salaries and Tips
2. Interest Income Statements – Form 1099 INT & 1099 OID
3. Dividend Income Statements – Form 1099DIV
4. Sales of Stock, Land Etc for Capital Gains – Form 1099B
5. Sales of Real Estate – Form 1099S
6. State Tax Refunds – Form 1099G
7. Alimony Received or Paid
8. Unemployment Compensation Received
9. Misc Income – 1099Misc
10. Retirement Income – Form 1099R
11. Social Security Income and/or Railroad Retirement Income – Form SSA-1099
12. Business Income and Expenses
13. Rental Income and Expenses
14. Farm Income and Expenses
15. Form K-1 Income from Partnerships, Trusts, and S-Corporations
16. Tax Deductible Miles Traveled for Business Purposes
17. Alaska – PFD

Credit and Deductions

18. Child Tax Credit
19. Child Care – Provider info, address, ID Number and Dollar Amount Paid
20. Earned Income Tax Credit
21. Adoption Expenses for Adoption Credit
22. First time Home Buyer
23. Medical Expenses for the family

- 24. Medical Insurance Premiums Paid
- 25. Prescriptions Medicines and Drugs
- 26. Doctor and Dentist Payments
- 27. Hospital and Nursing Home Payments
- 28. Mileage for medical travel
- 29. Home Mortgage Interest from Form 1098
- 30. Home Second Mortgage Interest Paid
- 31. Real Estate Taxes Paid
- 32. State Taxes Paid with Last year's taxes
- 33. Personal Property Taxes Paid
- 34. Charitable Cash Contributions
- 35. Fair Market Value of Non Cash Donations
- 36. Casualty and Theft Losses
- 37. IRA Contributions
- 38. Student Loan Payments

Tax Estimated Payments

- 39. Estimated Payments made with ES Vouchers
- 40. Last Years Overpayment applied to this year
- 41. Off Highway Fuel Paid

General Information

- 42. Copy of Last Year's Tax Return
- 43. Social Security Numbers for you and your spouse
- 44. Education Expenses for you and your spouse
- 45. Dependents Names, Date of Birth and Social Security Numbers
- 46. Dependents Post High School Education Expenses
- 47. Child Care Expenses for Each Dependent
- 48. Routing Number and Account Number for Direct Deposit