



2024 Personal Income Tax Checklist

Personal Information and Income

- ☐ **You, Your Spouse and Your Dependents**
Last year's return, full legal name, date of birth, Social Security number, driver's license number, issue, and expiration dates.
- ☐ **Personal Earnings Statements**
Form W-2's (for you and your spouse) and all 1099 forms
- ☐ **State and Local Tax Refunds and Unemployment Income**
1099-G forms
- ☐ **HSA and Long-Term Care Reimbursements**
1099-LTC (distribution document)
- ☐ **Interest and Investment Income**
Form 1099-INT, 1099-DIV, 1099-B and Schedule K-1
- ☐ **IRA's, Pensions and Annuities**
1099-R forms
- ☐ **Social Security and RRB Income**
SSA-1099 and RRB-1099
- ☐ **Trust and Estate Beneficiary Earnings**
Form 1041, Schedule K-1
- ☐ **Home or Property Sale**
Form 1099-S

Personal Deduction

Collect supporting documentation for any of the following expenses that apply to you.

- ☐ **Charitable Contributions and Donations**
Detailed list of contributions, receipts for donations, and Form 1098-C for vehicle donations or a letter of confirmation from the qualified charity.
- ☐ **Homeowner Expenses**
Form 1098 mortgage interest statements, property tax payment receipts, and receipts for qualified energy efficiency upgrades (certification if provided by the vendor).
- ☐ **Child and Dependent Care Expenses**
Name, address and Tax ID number or Social Security number of the care provider. The amount paid for care during the tax year.
- ☐ **Health Care Expenses**
1095 Forms (for health care coverage) and all records of medical, dental and vision costs for the tax year.
- ☐ **Education Expenses**
Itemized receipts for qualified educational expenses, tuition statements (Form 1098-T), student loan interest statements (Form 1098-E).
- ☐ **Job-Related Educational Expenses**
Detailed records of the expenses
- ☐ **IRA Contributions**
Form 5498
- ☐ **Health Savings Account Contributions**
Form 5498-SA