

2024 Personal Income Tax Document + Information Request (Exhaustive List):

INFORMATION REQUEST:

- o Client name + Spouse name
- o Client SSN + Spouse SSN
- o Client DOB + Spouse DOB
- o Mailing Address
- o Filing Status
- o At any time in 2024, did you receive, sell, or otherwise have a financial interest in digital assets (i.e. cryptocurrencies, NFTs, etc.)? *If Yes, more information will be requested.*
- o Dependent Name(s)
- o Dependent Relationship to You (i.e. son, daughter, child, parent, etc.)
- o Dependent SSN(s)
- o Dependent DOB(s)
- o At any time in 2024, did you pay for childcare expenses? Please provide provider name, EIN, address and amount paid. **limitations apply*
- o At any time in 2024, did you have a financial interest or signature authority over a financial account located in a *foreign country*? *If Yes, more information will be requested.*

DOCUMENT REQUEST:

- o Form W-2 Wage Statements
- o Form 1099 INT Interest Statement
- o Form 1099 DIV Dividend Statement
- o Form 1099-B Brokerage Statement
- o Form 1099-R Retirement Statement
- o Form 1099-SSA Social Security Income
- o Form 1099-G Unemployment Compensation
- o Form 1098-E Student Loan Interest **limitations apply*
- o Form 1099-NEC or MISC Self-Employment Income or Miscellaneous Income
- o Form 1095-A Marketplace Insurance
- o Schedule K-1 Partnership, S-Corporation, Trust Share of Income, Deductions + Credits
- o Form 1098 Mortgage Interest



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- o Self-Employment Profit or Loss: Schedule C
 - o Name of Business
 - o EIN
 - o Business Address
 - o Did you make payments in 2024 that would require you to file Form 1099? *If Yes, more information will be requested.*
 - o Profit + Loss Statement *please provide income and expenses*
 - o Home Office Expenses [2024 Instructions for Form 8829](#)
- o Rental Real Estate Profit or Loss: Schedule E
 - o Property Address
 - o Type of Property (i.e. single-family residence, short-term rental, etc.)
 - o Profit + Loss Statement *please provide income and expenses*
 - o Depreciation Details
 - Building cost
 - Date placed in service
 - Building Improvements cost + Date
 - Land Improvements cost + Date
- o Residential Energy Credit costs *i.e. solar power installed, energy efficient doors, energy efficient windows, etc.* [2024 Instructions for Form 5695](#)

ADDITIONAL:

- o Medical Expenses **limitations apply*
- o Charitable Contributions **limitations apply*
- o Estimated Tax Payments
 - o 2024 payments amount, date paid *federal + state payments*
- o Did you buy or sell a home in 2024? *If Yes, more information will be requested.*
- o IRS or state department correspondence related to tax year 2024
- o Please provide a copy of your prior year return, both federal + all states filed