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## 2024 Tax Appointment Checklist

### 1. All Taxpayers

- New York State (or out-of-state) Driver's License/photo ID for both taxpayer & spouse
- Forms W-2, W-2G (Gambling), 1099-R (Retirement), 1099-G (Unemployment), and 1099-SSA (Social Security)
- Bank account routing and account numbers (listed on the bottom of checks)
- Forms 1099-INT and 1099-DIV
- For new parents, social security number for the new baby
- Total paid for daycare and provider's name, address, and tax ID
- 1098 Mortgage Interest Form, real estate tax payments, closing statement if bought/sold, 1099-S if received
- Charitable contributions (cash and in goods and clothing)
- Medical expenses (if over 7.5% of your total income)
- All Forms 1095-A, 1095-B, and 1095-C Health Insurance Statements and 1099-SA for HSA Accounts
- Amount of alimony paid, ex-spouse's social security number or alimony received, date of divorce
- Contributions made to personal (non-work) IRAs or 529 Education Savings Plans
- 1098-T tuition statement & college billing statement if your dependents attended college
- 1098-E for student loans
- 1099-B forms or statements from banks and brokerages
- K-1 Forms from owners of partnerships, S corporations, or beneficiaries of trusts

### 2. Self-Employed or Independent Contractors

- 1099-MISC, 1099-NEC, K-1, QuickBooks P&L and Balance Sheet Reports or spreadsheet
- Tabulation and categorization of business-related expenses such as:
  - Advertising, Subcontractors, Insurance, Legal Fees, Office Supplies, Major Equipment Purchases
  - Office Rent, Telephone, Credit Card Fees, Auto Mileage, Travel, Client Meals, Tools, Licenses, and other costs
- In-home office information including square footage of home or apartment and dedicated office space and home expenses such as mortgage or rent, insurance, taxes, maintenance
- Any estimated tax payments made to prepay this year's taxes

### 3. Owners of Rental Income Property

- Income received from tenants and expenses both related to the whole house and specifically to rental use
  - Expenses to include advertising, maintenance, management fees, insurance, legal fees, mortgage interest, property taxes, repairs, supplies, utilities, and other related costs
- Original purchase price of home and major improvements, costs of furnishings and appliances
- Copy of prior year tax return (if not already provided)