

2024 - Things to Bring Check List
BE SURE TO BRING THE FOLLOWING WITH YOU

- ___ 1. All copies of W – 2, W-2P, 1099, 1098, Property Tax Bills and K-1 Forms.
(Including tax-exempt interest reported on 1099).
- ___ 2. All copies of Health Insurance Coverage Verification Forms 1095-A/B/C
(Required for compliance with the Affordable Care Act – (employer, insurance co. or state exchange)).
- ___ 3. **Completed Interview Questionnaire - 2024.**
(Please tell us what's new this year!)
- ___ 4. Documents for establishment, contributions and distributions for Health Savings
Accounts (HSA) (Form 1099-SA; etc.)
- ___ 5. **Completed** personal worksheets - income and deductions. **All 1099's you filed.**
- ___ 6. **2024 Escrow statements** (includes sales, new purchases and refinances)
- ___ 7. **Property tax bill** if purchased rental property. (For assessed tax values)
- ___ 8. **1099 Forms reporting all stock sales** for 2024, as well as purchase date and
cost basis information (Form 8949). Also provide records of all put and call activity.
Also include ALL CRYPTO wallet transactions. Any digital assets.
- ___ 9. **1099 Forms reporting unemployment compensation, state tax refunds,
pensions and social security benefits received.**
- ___ 10. **5498 Forms** reporting all IRA balances and accounts, including ROTH IRA'S.
- ___ 11. Social Security #'s and birth dates of all dependents (if not previously supplied)
(The IRS / FTB will reject the return if this information is not accurate).
- ___ 12. **2023 and 2022 tax returns** (new clients only).
- ___ 13. **All year-end mortgage loan statements, Forms 1098**, including those refinanced or
paid off during the year.
- ___ 14. **1099 Forms** reporting all IRA's transferred or distributed, Roth IRA
Contribution or Conversion
- ___ 15. Record of Federal and State **estimated tax payments** made.
- ___ 16. Name, address, phone and social security numbers of all **childcare providers.**
Required for childcare credit. Needed even if paid through a flex spending account.
- ___ 17. Any **IRS or Franchise Tax Board Correspondence** received during the year.
- ___ 18. All escrows and paperwork regarding any **foreclosure or short sale of real property.**
(Including all forms 1099-C, 1099-A, and CA F-3895)
- ___ 19. All tuition statements from higher education institutions (Form 1098-T).
- ___ 20. Signed Form 8332 for **dependents of non-custodial (physical) divorced parents.**
- ___ 21. Documents regarding all **stock options granted and exercised.**
- ___ 22. Any other documents you feel may be needed