1040 CLIENT CHECKLIST

GENERAL INFORMATION *(only complete if new info or changes)*

	Taxpayer	Spouse		
Name				
Address				
City, State, Zip				
Phone #				
Email address				
County of Residence				
County of Employment				
Social Security #				
Date of Birth				
Occupation				
Dependent(s) name				
Date of Birth				
Social Security #				

TAX FORMS *(provide forms; do not write amounts on this list)*

INCLUDED ↓	N/A ↓	WILL PROVIDE ↓	
			W-2s (wages)
			1099-INT (interest income)
			1099-DIV (dividend income)
			1099-B (stock/security sales)
			SSA-1099 (Social Security/disability income)
			1099-R (retirement income)
			1099-NEC (nonemployee compensation)
			1099-MISC (miscellaneous income)
			W-2G (gambling income)
			1099-G (unemployment, government & agricultural program payments)
			K-1 (S corp/partnership/fiduciary pass-through income)
			1099-C (forclosure/cancelled debt)
			1099-S (proceeds from sale of real estate)
			1099-K (payment card and third party network transactions)
			1099-SA (HSA distributions)
			1099-Q (education/529 plan distributions)
			1098 (mortgage interest statement)
			1098-E (student loan interest)
			5498-SA (HSA contributions)
			5498 (IRA contributions/FMV)
			1098-T (tuition paid)
			1095-A (marketplace insurance premiums/APTC)

1040 CLIENT CHECKLIST (cont'd)

Did you make all Federal Estimated Income Tax Payments? **Please include verification**

Date due	April 15, 2024	June 17, 2024	September 16, 2024	January 15, 2025
Date paid				
Amount				

Did you make all State Estimated Income Tax Payments? **Please include verification**

Date due	April 15, 2024	June 17, 2024	September 16, 2024	January 15, 2025
Date paid				
Amount				

DEDUCTIONS & CREDITS

Indiana College Choice contributions ***(provide account #, owner, and beneficiary)***

Designated for higher education	
Designated for K-12 tuition	

Rent paid for Indiana residence		Provide months rented	
Provide landlord name and address			

Energy improvement costs ***(provide item purchased, amount, & date)***

Donations to an Indiana college ***(provide date, amount, college name)***	
Charitable contributions - noncash (used items in good or better condition)	
Charitable contributions - cash, check, credit card	
Charitable mileage	
QCD (donations directly from your IRA to charity)	

****Supporting documentation is required for QCD; Form 1099-R DOES NOT indicate what amount went to charity.***

**Cash and non-cash donations greater than $250 require a written contemporaneous acknowledgment from the donee organization.*

Health insurance premiums ***(excluding Medicare and pre-tax employer deductions)***

Medical expenses		Nursing home costs	
Prescription costs		Medical mileage	
Long-term care premiums for taxpayer		Indiana Partnership LTC premiums?	
Long-term care premiums for spouse		Indiana Partnership LTC premiums?	
Healthcare Sharing Ministry Premiums			

Real estate taxes		Private/home school expense	
Auto excise taxes		Child care expense	
Sales tax on major purchase		Educator expenses	
		Gambling losses	

Roth IRA contributions - Taxpayer	
Roth IRA contributions - Spouse	
Traditional IRA contributions - Taxpayer	
Traditional IRA contributions - Spouse	

Please answer the following questions marking yes or no. ***For all yes answers please provide us with all pertinent information regarding that transaction.*** All questions pertain to the current tax year.

	YES	NO
Give gifts to any individual of more than $18,000?		
Noncustodial parent claiming your child (include signed Form 8332)?		
Buy, sell, or exercise stock options?		
Sell or trade-in a vehicle that has been used for business?		
Purchase a new or used "clean energy" vehicle?		