

REQUIRED DOCUMENTATION: This is just to assist you in gathering the documents that apply to you {trigger your memory} Not all will apply to you, and not all will be listed.

INCOME DOCUMENTS REQUIRED {All may not apply/all may not be listed}

<input type="checkbox"/> Wages (Includes W-2)	<input type="checkbox"/> Unemployment Compensation (Includes 1099-G)
<input type="checkbox"/> Interest Income (Includes 1099-INT)	<input type="checkbox"/> Gambling Winnings (Includes W2-G)
<input type="checkbox"/> Dividends (Includes 1099-DIV)	<input type="checkbox"/> Independent Contractor (Includes 1099-NEC/MISC.)
<input type="checkbox"/> Brokerage/Investment Sales (Includes 1099-B)	<input type="checkbox"/> Rental Income (Includes 1099-MISC. or Support)
<input type="checkbox"/> Social Security (Includes SSA-1099)	<input type="checkbox"/> Receipt/Sales of Digital Assets/Cryptocurrency **[please contact us for additional requirements if you have these funds]
<input type="checkbox"/> IRA/Pension/Annuity Income (1099R) {distributions}	<input type="checkbox"/> Schedule K-1's
<input type="checkbox"/> Debt Cancellation (1099-C)	<input type="checkbox"/> Alimony [paid or received] Must have start date and amounts
<input type="checkbox"/> Health Insurance Forms – employer insurance or Marketplace insurance – 1095-A form, 1095-B, 1095-C	<input type="checkbox"/> Sale of home {form 1099-S}
<input type="checkbox"/> Retirement Contributions {outside of employer} ROTH, IRA, etc. Provide statements	<input type="checkbox"/> Healthcare HSA flexible spending account {1095-B and 1095-C}

ITEMIZING INSTEAD OF STANDARD DEDUCTION

In order to benefit you – itemized deductions must go above the standard deduction. The items below are the main deductions to consider. Please provide this information if you think you can itemize.

<input type="checkbox"/> Real Estate Taxes	<input type="checkbox"/> Property Taxes paid in 2024 {vehicles, boats, etc.} Provide copy of forms
<input type="checkbox"/> State taxes paid {through payroll deductions or previous year amount paid in 2024}	<input type="checkbox"/> Charitable Contributions to qualified organizations
<input type="checkbox"/> Mortgage Interest (Form 1098)	<input type="checkbox"/> Gambling Losses (Must Have Received Winnings)
<input type="checkbox"/> Unreimbursed Medical Expenses – these cannot be pre-taxed dollars through your payroll or from your HSA. Any dollar amounts over 7.5% of your total income can be counted. Doctors, prescription, dental, eyes, etc.	

2024 Standard Deduction Amounts for guidance: Single/Married Filing Single \$14,600 -- Married Filing Joint or Qualified Surviving Spouse \$29,200-- Head of Household \$21,900

For age 65 or older/blind add \$1,500-\$1,850 per person

ENERGY CREDITS: RESIDENTIAL OR VEHICLE

There are many different credits and requirements to take the energy credits. If you have done residential energy updates/purchases or have purchased a vehicle that qualifies, please let me know and I will send over information on these credits and the documents you will be required to send.

REQUIRED ID-DOCUMENTS

Please see the Required ID File on the website.

that TAX PLACE

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