



VOLUNTEER INCOME TAX ASSISTANCE - VITA

2024 INFORMATION CHECKLIST



NAME: _____

Please bring in HARD COPIES OF YOUR TAX INFORMATION including all statements and documents – NO ELECTRONIC COPIES PLEASE – including your own records. Don't forget your bank information BELOW.

If you have an Identity Protection Pin (IPP), BRING THIS YEAR'S LETTER!

INCOME	DEDUCTIONS/EXPENSES
<ul style="list-style-type: none"> • W-2 Forms (bring <u>all</u> W-2s & complete the W-2 worksheet on page 4) • 1099 INCOME FORMS: <ul style="list-style-type: none"> 1099-INT-Interest (under \$10-bring year-end stmt.) 1099-DIV-Dividends (under \$10-bring year-end stmt.) 1099-C - Cancellation of Debt 1099-G - Unemployment Compensation and State Tax Refunds (If not received, go online to print form) 1099-B - Sale of Stock/Mutual Funds (must have original purchase, date, cost, and sale info.) 1099-K - 3rd-Party Pmts (Venmo, Paypal, Uber, etc.) 1099-MISC – Royalty Income 1099-NEC – Self-Employment Independent Contractor/Freelance Earnings (Performing and Non-Performing Income) 1099-R - Pension/Retirement Earned 1099-SSA - Social Security. • Alimony Received - (NOT child support) • Prize Winnings, Lotto, Jury Pay, Election Pay, etc. • Do you OWN Digital/Crypto Currency? Y _____ N _____ • Did you SELL Digital/Crypto Currency? Y _____ N _____ • Do you have money in Foreign Accounts? Y _____ N _____ • ALL OTHER INCOME: whether or not listed here. • DIRECT DEPOSIT OR DEBIT- Blank Check OR: Routing #. _____ Acc't # _____ Bank Name _____ Checking Acct _____ Savings Acct _____ 	<ul style="list-style-type: none"> • Medical Expenses: (Include ALL ACA Documents) <ul style="list-style-type: none"> Med & Dental Insurance Premiums \$ _____ Medicare Part A, B, C Premiums \$ _____ If on the Marketplace/ Exchange, must have 1095-A Long-Term Care Insurance Premiums \$ _____ Med.Costs (co-pays, out-of-pocket, incl. Transp.) \$ _____ • Charitable Contributions – Cash, Check, CC \$ _____ • Charitable Contributions - Goods Donated \$ _____ (If over \$500, bring name of charity, EIN, address, date of donation and valuation of goods) • Mortgage Interest (Form 1098) \$ _____ • Real Property Taxes (less Rebates) \$ _____ • Child/Dependent Care Costs (provider ID, name, address) \$ _____ • Alimony Paid (NOT child support – bring details) \$ _____ • Retirement (circle one) IRA/ Roth/SEP \$ _____ • Bus., Auto & Travel Expenses (complete worksheets) • Investment Income Expenses (bring stmt.) • College Tuition 1098-T/Student Loan Interest Pd • Total Rent You Paid Last Year \$ _____ • Electric Vehicle/Energy Home Equip? Y _____ N _____
	<p>PAYMENTS YOU MADE</p> <ul style="list-style-type: none"> • Payment to state(s) when you filed your returns LAST year? Amount: \$ _____ • Did you pay Estimated Taxes for 2024? (Provide Info) Date _____ Date _____ Date _____ Date _____ Fed 1st \$ _____ 2nd \$ _____ 3rd \$ _____ 4th \$ _____ State 1st \$ _____ 2nd \$ _____ 3rd \$ _____ 4th \$ _____ • Filing after the 15th? Did You Pay Extensions? Y _____ N _____ Fed \$ _____ State \$ _____