Tax Season 2024 Checklist

Organize Your Documents

Staying organized will reduce your stress (and ours!) and allow us to be more efficient. In January 2024, start gathering your tax documents. Below is a list of documents MOST taxpayers will need. Additional documents may be required based on your individual situation. **We suggest you use your prior year tax return as a roadmap to the documents you will need to complete your 2024 tax return.**

Personal Information:

Name(s):	**Email Address Taxpayer:**
Address:	**Email Address Spouse:**
	Cell Number:
Dependent(s):	
I would like to receive my completed tax return electronically:	**Yes** ☐ **No, hardcopy please** ☐ **(Please Note: there will be a $45.00 fee for a second copy)**

Sources of income:

☐ Employed, Form W-2	☐ Schedule K-1's for partners, shareholders and beneficiaries of trusts/estates
☐ Unemployed, Form 1099-G	☐ Rental Income / Self-employed, Forms 1099-Misc or NEC, record of all income & expenses, & business mileage
☐ Retired, 1099-R, SSA-1099	☐ Savings & Investments, Forms 1099-INT, 1099-DIV, 1099-B, incl. stock option supplemental stmts & Crypto
☐ Other: Gambling winnings, Alimony paid/received (final prior to 2019), 1099-S (Sale of Real Estate), 1099-SA (HSA reimbursements), 1099-Q (529 Plan distrib.), **1099-K for amounts paid thru Venmo, PayPal, ApplePay, etc.**	

Potential deductions and credits:

☐ 1098 or other **mortgage interest** and/or statements and real property tax bills	☐ Receipts for **energy-saving home improvements** (e.g., window, doors, solar panels, solar water heater)
☐ Amounts donated to charitable organizations and detailed receipts of non-cash **charitable donations**	☐ **Proof of health insurance**, Form 1099-HC, 1095-B; Form 1095-A if you enrolled in an insurance plan through the Marketplace (Exchange)
☐ **Education credits**: 1098-T, Tuition/1098-E, student loan interest	☐ **Child-care expenses** including amount paid, provider name, address, and Federal ID number
☐ **IRA/SIMPLE/SEP Contribution**, Form 5498	☐ **MA renters:** amount paid, landlord name and address ☐ **Seniors:** Real estate tax and water bills

Other:

☐ Record of **estimated tax payments**, if applicable, including amounts and dates of payments	☐ **Provide proof your dependents live with you** to claim education credits, child tax credit, dependent care credit and head of household status
☐ **Direct deposit / debit information…** It's faster AND safer. RECOMMENDED	☐ **A signed APL Client Engagement Letter** REQUIRED
☐ **Identity Protection PIN**, if issued to you, your spouse, or your dependent by the IRS	☐ Any correspondence received during the year from the IRS or state agency

Please note:

- Documents submitted electronically **must** be in PDF format. JPEG, GIF, PNG, etc. will no longer be accepted. They are too difficult to work with. There are free PDF converter apps you can download on your android or iPhone.
- **Deadline to submit your paperwork is March 18, 2024**. Clients will be placed on extension after this date and a fee of $150 will be charged to process an extension.