

2024 CHECKLIST FOR ACCURATAX LLC

Tax Payer Name _____ Phone _____

Email _____ Spouse Email _____

(If your bank info is same as 2023 - just need last 4 of acct _____
(Direct Deposit Info)

Bank Name _____ Routing No. _____ Account _____

1) Did your home address change in 2024? ___NO___YES (Yes, list address in notes)

2) During 2024, did you receive a reward, award, payment or sell, exchange, gift
or dispose of a digital asset (bitcoin, etc)? ___NO___YES

3) Do you have foreign accounts ___NO___YES
If Yes is total of all foreign accts more than \$10,000? ___NO___YES

4) Do you have an HSA (Health Savings Account? ___NO___YES
IF YES, NEED DISTRIBUTION FORM. (1099-SA) or amount withdrawn for medical.

5) Do you have MARKETPLACE insurance?(OBAMACARE) ___NO___YES
IF YES, PLEASE PROVIDE 1095A TAX FORM.

6) Did you pay ESTIMATED tax payments for 2024? ___NO___YES
IF YES, PLEASE PROVIDE AMOUNTS AND DATES PAID. (List Dates if not Due Date)
Apr 15 _____ /June 15 _____ /Sept 15 _____ /Jan 15 _____

7) Did you sell or buy a house in 2024? ___NO___YES

8) Do you have any dependents? ___NO___YES (If yes, please fill out page 3)

NOTES:

NEW CLIENTS ONLY (NEED COPY OF PREVIOUS YEAR TAX RETURN**)**

Tax Payer Social Security No _____ DOB _____

Spouse _____ Social Security No _____ DOB _____

Address _____

NOTE: This page is only a checklist to assist you with forms you may include for tax prep.

Income and Deductions

_____ W2 Forms (Wages)
_____ 1099_NEC (Contract Work)
_____ 1099_MISC (Other Income)
_____ 1099-INT or December Bank Statement (Banking Interest)
_____ Unemployment (Form 1099-G)
_____ Retirement Benefits (1099-R)
_____ Social Security Benefits
_____ Alimony Received
_____ HSA Contributions and Distributions 2024
_____ Daycare expenses
_____ College Education loan interest
_____ 1098T College Education (Other Required Books/Materials)
_____ Educators Credit (Limit of \$300 school supplies)
_____ 1099-B sold mutual funds or stock (Need Sell & Buy amounts)
_____ 1099-DIV if you receive dividends from Mutual Funds or Stock
_____ IRA Contributions for 2023 (Don't need Roth Information)

IF YOU ITEMIZE HERE ARE THE ITEMS YOU CAN USE`

(MFJ \$29,200, Single \$14,600, Household \$21900)

_____ 1098 (House Interest)
_____ Property taxes (2023 taxes paid in 2024)
_____ New Vehicle Purchase in 2024 (Please supply sale receipt)
_____ Cash contributions paid to Non-Profits
_____ Gift contributions given to Non-Profits
_____ Medical Expenses Out of Pocket NOTE: CANNOT BE FUNDS HSA PAID
_____ Medical Premiums (Employee paid insurance can't be used))
_____ Long Term Care Payments
_____ Last Years State Refund Card

RENTAL PROPERTY: (Rental worksheet on AccuraTax Website)

_____ Rental Income
_____ Mortgage Interest
_____ Property Taxes
_____ Property Insurance
_____ Supplies
_____ Repairs
_____ Assets purchased. (Roof, Appliances, Vehicle)

NOTES:

AccuraTax LLC Tax Phone (970) 310-5232 Fax (970) 679-1673 Email:
todd@accurataxllc.com Website: www.accurataxllc.com

THIS SECTION FOR CLIENTS WITH DEPENDENT CHILDREN

ONLY NEED NEW CLIENTS CHILDREN LISTED OR NEW CHILDREN BORN IN 2023.

Name _____ Social _____ DOB _____

Name _____ Social _____ DOB _____

Name _____ Social _____ DOB _____

Name _____ Social _____ DOB _____

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1) Is your dependent unmarried? ___Yes ___No

2) Could another person qualify to claim your child? ___Yes ___No

3) Did the child live with you over ½ of the year? ___Yes ___No

4) Is your dependent a citizen of the United States? ___Yes ___No

5) Have you ever been disallowed child tax credits? ___Yes ___No

6) Please provide one piece of documentation that helps support
the child as a dependent?

(Medical Insurance, Medical Record, School Record, Childcare
Provider Records, Social Services Statement, Employer Statement)

7) Do the answers to the above questions apply to all your
dependents? ___Yes ___No

Other Optional Questions:

1) If this child isn't your child, why is the parent not
claiming the child?

Notes: _____

If Dependent became 17 or older in 2024 answer questions below.

1) Was the dependent in High School or College anytime in 2024?
___Yes ___No

2) If no, did dependent earn more than \$4700?

NOTES:

**This form is ONLY a checklist for businesses. Provide additional documentation. Example: P&L Statement.
(ACCURATAX WEBSITE HAS A P&L Statement you can use)**

Name of Business _____

Business Product or Service _____

EIN or Social Security Number _____

How many years have you owned business _____

Date started business

Income for the year

Advertising

Contract Labor

Payroll & Payroll Taxes

Office expenses

Rent or Leases paid

Taxes & Licenses

Travel expenses

Meals WITH CLIENTS/EMPLOYEES (100% if in restaurants for 2022)

Meals at Meetings WITH EMPLOYEES (100%)

Gifts to Clients (Limit is \$25 per client)

Interest or Penalties on loans or credit cards for business.

Legal & Professional expenses

Cell phone or Business phone (Percentage for Business)

Internet (reasonable % used for Business)

Repairs and Maintenance

Tools and/or Material expenses

Insurance expense (Business Insurance Only)

Medical Insurance (Medical Premiums are deductible if self
employed and you nor your spouse has ACCESS to employee
insurance through a W2 job)

Other Expenses

VEHICLE EXPENSES - Any vehicle expenses need miles log.

Vehicle Year and Model

Purchase Price

Date vehicle put in business

Odometer reading beginning of year and end of year

(Miles Method) Business miles driven / Personal miles driven

(Actual Expenses Method) - (Gas, Insurance, License, Maintenance)

Need miles driven for the business if personal vehicle.

HOME OFFICE EXPENSE

Full House square footage

Home Office square footage

House Market Value (Generally this is Purchase Price)

Cost of any major improvements to property this year

Mortgage Interest or Rent

Property Taxes

Property Insurance

Utilities (Gas, Electric, Trash)

NOTES: _____

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