GO TO **WWW.TAXOFFICEFORMS.COM** TO MAKE AN APPOINTMENT

BELOW IS A PARTIAL LIST OF THE COMMON INFORMATION AND DOCUMENTS NECESSARY TO PREPARE A FEDERAL INCOME TAX RETURN. MANY OF THE DEDUCTIONS LISTED ARE SUBJECT TO LIMITATIONS AND PHASE OUTS BASED ON INCOME OR OTHER FACTORS.

**2024**

□W-2 FROM ALL EMPLOYERS. BRING LAST PAYCHECK FROM 2024 (IF AVAILABLE) AND TIP INCOME NOT ON W-2.

□W-2G FOR ALL GAMBLING WINS. GET WIN/LOSS STATEMENTS FROM CASINO(S).

□1099-INT, 1099-DIV: SHOWING INTEREST AND DIVIDEND INCOME.

□1099-R FOR ANY RETIREMENT MONEY RECEIVED.

□1099-SSA FOR SOCIAL SECURITY BENEFITS RECEIVED (RED & WHITE FORM).

□1099-G FOR ANY STATE UNEMPLOYMENT BENEFITS YOU RECEIVED.

□1099-G FOR ANY OTHER STATE INCOME TAX REFUNDS.

□1099-B FROM INVESTMENT COMPANIES FOR SALE OF STOCK.

□1099-MISC AND ANY OTHER INCOME.

□1099-C/1099-A FOR CANCELLATION OF DEBT INCOME.

□K-1 FROM PARTNERSHIPS, S-CORPS OR TRUSTS.

□BUSINESS INCOME AS A SOLE PROPRIETOR-SUMMARIZE EXPENSES BY CATEGORY AND TOTAL MILEAGE (1099-NEC).

□RENTAL INCOME AND EXPENSES BY PROPERTY AND CATEGORY, LIST MAJOR PURCHASES WITH DATE & AM’T PAID.

□ALIMONY RECEIVED OR PAID FROM PRE-2019 DIVORCE.

□RECEIVE, SEND, EXCHANGE, OR SALE OF VIRTUAL CURRENCY IN 2024 (E.G. BITCOIN).

□MEDICAL EXPENSES (IF GREATER THAN 7.5% OF YOUR INCOME IF YOU ARE ITEMIZING).

□SALES TAX ON NEW AUTO PURCHASE. BRING SALES STATEMENT/LEASE PAYMENTS.

□OTHER TAXES PAID, DMV TAXES PAID ON VEHICHLE REGISTRATIONS, ETC.

□REAL ESTATE TAXES PAID FOR EACH PROPERY.

□1098-MORTGAGE/HELOC INTEREST ON ALL PROPERTIES.

□FORM 1095-A (REQUIRED) FROM HEALTH EXCHANGE IF YOU HAVE ACA (OBAMA CARE).

□STUDENT LOAN INTEREST PAID IN 2024 (1098-E).

□1098-T FOR VALUABLE EDUCATION CREDITS. MUST GET 1098-T FOR STUDENT FROM SCHOOL ACCOUNT.

□CHILD CARE COSTS. REQUIRES AMOUNT PAID WITH PROVIDERS NAME, ADDRESS AND TAX ID.

□ MANUFACTURER CERTIFICATE FOR QUALIFYING HOME ENERGY OR ELECTRIC CAR CREDITS.

□IRA CONTRIBUTIONS (CAN CONTRIBUTE UP TO APRIL 15TH for 2024).

□ESTIMATED TAX PAYMENTS-FEDERAL AND STATE- DATES AND AMOUNTS PAID.

□SETTLEMENT OR DISCLOSURE STATEMENT FROM TITLE COMPANY FOR ANY REAL ESTATE SALES, PURCHASES OR REFINANCING.

□PROVIDE FOREIGN FINANCIAL ACCOUNT DETAILS IF $10,000 OR MORE WAS HELD IN FOREIGN ACCOUNTS AT ANY TIME IN 2024.

□BRING SOCIAL SECURITY CARDS FOR ALL DEPENDENTS IF NOT COPIED BY THIS OFFICE PREVIOUSLY.

□PROVIDE A COPY OF A CHECK IF DIRECT DEPOSIT OF REFUND OR DIRECT DEBIT OF BALANCE DUE IS REQUESTED.

□PAYMENTS FOR SERVICES FROM A TRADE OR BUSINESS TOTALING $600 OR MORE REQUIRE THAT A 1099 BE ISSUED BY 1/31/2025.

□EMPLOYERS WITH FIVE OR MORE W-2 EMPLOYEES ARE REQUIRED TO OFFER A RETIREMENT PLAN (NEW FOR 2025).

TEL: 702.259.1040 FAX: 702.870.6817 EMAIL: TAXOFF@AOL.COM

For better identity protection get an annual IP PIN at www.irs.gov. Search “Get an IP PIN”. Bring your current IP PIN to your appointment.

**WE WILL TAKE RESPONSIBILITY FOR FILING AN EXTENSION OF TIME TO PREPARE YOUR INCOME TAX IF YOU CONTACT US TO REQUEST AN EXTENSION.**

It is a taxpayer’s responsibility to maintain organized documentation of the income and deductions claimed on a tax return. Documentation includes but is not limited to records on income received, receipts and proof of payment for deductions indicating purpose, mileage logs, gambling logs, and a general ledger for business income and deductions.

We cannot share your information with a third party unless you provide written consent in accordance with federal law.