

Client Name:

2024 Universal Tax Record Checklist

Please review this checklist to make sure we don't miss anything!

Please send a copy of your 2023 tax return and a photo ID if you are a new client.

W-2 Forms.

1099 Forms. (These could be 1099-R, 1099-MISC, 1099-S, 1099-INT)

Certificate of Rent Paid if you rent your home.

Do you or your spouse have an IPIN? (IRS issued ID Theft Pin #)

Has your marital status changed since 12/31/2023?

Are there new dependents in your household since 12/31/23?*

Have you received any correspondence re your 2023 taxes?

Do you need advice on any special issues now or in 2025?

Do you have a bank (checking or savings account)?

Did you sell a home in 2024?

Are you still waiting for certain tax documents to come?

Have you filed for bankruptcy or had debt cancelled in 2024?

Do you have health insurance?

Did you receive any nontaxable income?

MFP Work Comp Other < Check all that apply.

* Bring a social security card and birth certificate for any NEW dependents on your return.

New clients should bring both (SS card and birth Cert) for all children on the EIC form)

Contact Info :

Taxpayer: DOB

Spouse: DOB SSN

Address:

New Dependents:
Name SSN DOB

Home Telephone:

Cell Phone: (Text Y or N)

Email taxpayer:

Email spouse:

State Income Tax - Did you live or work in another state other than your home state? Y N

Dates of Residence:

Spouse Date if dif:

Delivery Preference:

YES NO

Do you have?
Roth IRA

PO Box 1279

529 Plan Educa

Burnsville, MN 55337-0279

401K or other retire plan

Tel (320) 629-4745

HSA

Fax (516) 941-0225

U.S. Savings Bonds

email todd@toddstaxservice.com

Cell (612) 242-5713 texts ok.

INCOME CHECKLIST

IRS Form

Wages	W-2
Unemployment	1099-G
Interest	1099-INT
Gambling	W-2G
Self Employment	1099-MISC
IRA/ 401K Distribution	1099-R
Pension	1099-R
Social Security	1099-SA
Investment Act	1099
Crypto Account	1099
"Gig" Economy	1099
Sale of Real Estate	1099
K-1 Estate, Trust, S Corp, Part	
Rental Income	
Other - please specify:	
Foreign Accounts?	
Open IRS Issues?	
HSA Distribution (Form 1099SA)	
Form 1095-A from Health Exchange	
Forms 1095 -A, B or C (Health)	

ST # 1	ST #2
ST # 1	ST #2

Online

US Mail

Date of initial client submission of info to Todd: ____-____-____

Daycare Info:
 Name of Provider: _____
 Address of Provider: _____
 Fed Tax ID of Provider: ____-____-____
 Amount Paid: _____ Care for: ____/____/____

Tuition Information:
 We need 1098-T AND cancelled checks!
 Name of College Student: _____
 Name of College: _____
 Out of Pocket Costs - list: _____
 Tuition and Fees _____
 Books (Required) _____
 Grants / Scholarships? _____

Name of College Student: _____
 Name of College: _____
 Out of Pocket Costs - list: _____
 Tuition and Fees _____
 Books (Required) _____
 Grants / Scholarships? _____

Mileage:
 Description of Vehicle: _____

	Car #1	Car #2
Gross (Total) Mileage for YR		
Commuting Miles (not ded)		
Work related miles not DEDUCTIBLE		
Charity Miles		
Medical Miles		

You must have written records (log) to take a deduction.
Mileage to and from home and work is not deductible.

	2023	2024
Mileage Rates	65¢	67¢
Business Use	22¢	221¢
Medical	14¢	14¢
Charitable	22¢	21¢
Moving		

Deductions/Credits Detail

I have received a copy of this checklist:
 Taxpayer Initials _____ Spouse Initials _____

DEDUCTION /CREDIT CHECKLIST
 Medical Bills _____
 Mortgage Interest _____
 Property Taxes _____
 Contributions _____

Work Related Expenses
 Tuition _____
 Casualty/Theft/Loss (Fire, Flood) _____
 Daycare expenses _____
 Student Loan Interest _____
 Auto Tax (Tabs) _____
 State: _____
 Minnesota K-12 School _____
 Wisconsin Rent/Prop Tax Paid _____
 WI Rent - Heat Paid? _____
 Long Term Care Ins Premiums Paid _____
 Health Ins Premium if you pay out of your ckg act. _____

Total Fee

Car # 1 Tabs (License Plates)	
Car # 2 Tabs (License Plates)	
Car #3 Tabs (License Plates)	

The personal property tax is deductible and is the amount over \$52.

Boat, Snow Mobile, RV, Tlr - NOT DED
 State Balance Due Paid for 2023 _____
 State Balance Due other years _____
 Interest on back taxes is not deductible.
 Did you buy a new car, boat or RV? _____
 Real Estate Tax Paid _____

Home _____
 Cabin/Second Home _____
 Land _____
 Penalties and late payment interest not deductible.

Sales Tax on new car or truck: _____
 Use higher of income tax or sales tax.

Energy Credit:
 Home (Solar, Insulation, Heat Pump, Geothermal)
 New or Used Electric Car Heatpump

Retiree Tax Planning Questions:
 Y or N

Do you have a will? Updated: _____
Do you have IRA accounts? _____
Do you have more than \$100,000 in IRAs? _____
Do you have a ROTH IRA? _____
Do you have Long Term Care Insurance? _____
Do you own land? _____
Have you filed a "Transfer on Death" Deed? _____
Have you made gifts in excess of \$18,000 per person? _____
Do you have more than \$10,000 in savings bonds? _____

K-12 Expenses

Name:	Grade:	Supplies	Music Lessons	Musical Instrument	Computer Purchase	Tuition/Tutoring	Transportation Paid

Do not include:
 internet fees, school lunches, clothing optional items.
 You must have receipts for school items.

2024 Standard Deduction

Single	14,600	+65	1,950
Head of Household	21,900	+65	1,950
Married Filing Joint (Higher for 65+)	29,200	+65	1,950

Office in home
 Must use office area exclusively Minnesota Non Game Wildlife Designation: YES _____ NO _____
 for business. Ask for info. US Presidential Election Fund YES _____ NO _____
 Minnesota Political Party: R _____ D _____ G _____ I _____
 Please attach a voided check for direct deposit or direct debit. Todd's Tax