OLSON & ASSOCIATES LLC
CERTIFIED PUBLIC ACCOUNTANTS

6003 7th Avenue Kenosha, WI 53143 Phone: 262-925-7017 Fax: 1-866-491-3607

2024 Information Checklist

This is a list of the most common items we will need to finish your returns.

Upload to your tax dome portal or drop off, email.

CUT OFF DATE : Thursday March 20, 2025

___ Complete 1040 Tax Organizer in Tax Dome

___ All W-2's

___ All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, etc.

___ 1095-A (only if you have Marketplace insurance)

___ Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid

___ Total of all receipted charitable contributions and details for any non-cash contributions over $500

___ Copies of all LLC, Partnership or S-Corporation K-1's (send separately later if everything else is ready, and let us know it's coming)

___ If you bought and/or sold real estate, please provide closing statement for each transaction

___ If you sold any shares of mutual funds and basis information is not provided by the broker, detail all activity in the funds sold from original purchase date through date of sale (year-end summary statements are ideal)

___ If you are claiming auto mileage as a deduction for business or rental properties, we need to know the total miles, commuting miles, and business miles driven for the year

___ FOR BUSINESSES ONLY: If you lease your car or are deducting actual expenses, please also provide: original value of the car (what you could have bought it for) and date of lease, as well as all expenses for lease payments, gas, car washes, licenses, insurance, tires, repairs, etc.

___ Copies of any federal, state or local tax correspondence during the year, including all payments made or refunds received.

___ All legal documents for formation, sale or purchase of a business during the year

___ All legal documents for divorce decrees

___ Voided Check for account where refunds should be direct deposited – **REQUIRED for direct deposit**

___ **New Client: copies of prior federal, state and local returns and depreciation schedules if applicable. (at least one year, preferably three)**