

City Center Tax Group

2024 Tax Appointment Checklist

	Description	✓
1.	Last year's tax returns (if not prepared by this office)	
2.	W-2 Forms	
3.	1099 Forms for interest and dividends, sale of stock/mutual funds	
4.	1099-R Forms for pension and IRA distributions	
5.	Small business income and expenses including 1099-NEC and 1099-K forms received	
6.	Rental property income and expenses	
7.	Statement of IRA contributions made	
8.	Other Income: Alimony, gambling, hobby, cancellation of debt, unemployment	
9.	Foreign account statements (not reported on mutual fund or brokerage account)	
10.	Digital Asset account statements	
11.	Childcare expenses	
12.	Real estate settlement statements from refinancing, purchase and/or sale	
13.	Itemized Deductions:	
	- Medical expenses	
	- Real estate taxes	
	- Personal property taxes	
	- Mortgage interest statements	
	- Charitable contributions	
14.	Tuition Savings Plan (529 Plan) contributions and/or distributions Form 1099-Q	
15.	Student loan interest statement - Form 1098-E	
16.	College tuition and fees (Form 1098-T and tuition account printout), receipts for books and supplies	
17.	Estimated tax payment record (cancelled checks or bank records) for federal and state	
18.	Health Insurance form 1095-A	
19.	Driver's licenses or other state ID for taxpayer and spouse	
20.	IRS and/or state correspondence received including IRS and state PIN numbers	

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