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Income Tax Checklist

Visit our website for updates: www.lmrcpas.com

Use the list below to help remind you of items needed in order to accurately prepare your tax return

IF YOU HAVE A VIRTUAL APPOINTMENT PLEASE HAVE TAX DOCUMENTATION IN OUR OFFICE 5 TO 7 DAYS BEFORE APPOINTMENT.

- Checklist items: Taxpayer Name, DOB, SSN; Spouse Name, DOB, SSN; Dependents, DOB, SSN; Home Address; Phone Numbers; Emails; Health Insurance Forms 1095-A, 1095-B, 1095-C; New clients please provide a copy of your prior year tax return; Direct deposit of refund provide voided check or Routing #; Bank Account #; Letters or other correspondence from the Internal Revenue Service(IRS); Letters or other correspondence from State or Local Taxing Agencies

- Checklist items: W-2s from all employers; Interest, dividends, annuities; Education savings bonds; MI income tax refund; City tax refund; W-2 G (Gambling Winnings); MI property tax credit; Alimony received; Stock/Investment; year-end tax statements; 1099s from IRA's, Pensions; 5498s from IRAs; K-1's Partnerships, S-Corp; K-1's Trusts, Estates; Rental income; Child Support; VA Benefits; Unemployment; Workman's compensation; Social Security - taxpayer; Social Security - spouse; Sale of residence; Sale of vacation/investment property

Deductions

Education

- Checklist items: College tuition & fees; Room & board, books, supplies; MESP/529 contributions; MET plan purchases; Student loan interest

IRAs

- Checklist items: Traditional or Roth; limit \$7,000 if under 50, 50 or older limit \$8,000; Education savings account; SEP IRA (self employed); Solo 401k (self employed); SIMPLE IRA (self employed); Roth 401k

Child Care Credit

- Checklist item: Total expenses per child; please provide name, address, & ID # of provider

Renter's Credit

- Checklist item: Total rent paid; please provide landlord's name & address

Medical Expense

- Checklist items: Health insurance premiums; Health savings acct (HSA); Prescriptions & medicines; Doctor charges; Dentists/Orthodontist; Glasses & hearing aids; Lab fees, x-rays; Hospital charges; Long term care expense; Sugar kits, other equipment; Medical travel (total miles); Treatment programs; Rehabilitation programs

Taxes

- Checklist items: Record of estimated taxes paid; Property tax statements; Real estate closing papers; License plates & tabs; Sales tax paid

Energy Credits

- Checklist items: Hybrid or electric vehicles; Solar, wind, geothermal; Fuel cell technology; \*\* Exterior doors, windows, skylights, insulation, water heaters, biomass stoves, boilers, furnace and air conditioners. Starting in 2025 you will need a pin number from the manufacturer to qualify for credit

Interest Expense

- Checklist items: Mortgage interest to bank; Mortgage to private party; Home equity loan; Investment fees; Mortgage points; Mortgage insurance; Premiums

Donations

- Checklist items: Church/Temple; Schools, Hospitals, Food banks ext; Charitable miles driven; Charitable IRA rollover; Any other qualified non profit; Non-Cash (clothing, furniture ext, itemized list); Receipts required for Cash donations over \$250; Car/Boat do

Miscellaneous

- Checklist items: Alimony paid; Gambling losses; Teaching supplies/materia; Adoption expenses; Casualty/theft loss; Un-reimbursed expenses for US Armed Forces; Moving expenses for US Armed Forces