THE DAGES GROUP
Certified Public Accountants

Tax Checklist for Individuals

Please review this list to be sure you have everything gathered and note any questions you have.

	Attached	N/A
Any updates to your mailing address, cell/home/work numbers or e-mail addresses?	___	___
Any changes in dependents? Remove or add? If add, provide name, date of birth and SSN and gender.	___	___
Bank account to use for drafts or deposits, as found on a check from the account, if different from last year	___	___
If you renewed your driver's license since last year, provide new issue and expiration dates	___	___
Did you inherit an IRA during the tax year?	___	___
Did you make any home energy efficient purchases? **HOME ENERGY INFO**	___	___
Did you purchase an electric vehicle during the tax year? **CLEAN VIEHICLE INFO**	___	___

Income:

		Attached	N/A
• W-2	Salary, Gambling Winnings and any notices describing stock options or special situations	___	___
• 1099-INT	Interest Income	___	___
• 1099-DIV	Dividend Income/Capital Gain Distribution	___	___
• 1099-B	Sale of Investments-provide any missing purchase price and date	___	___
• Digital Assets	- Sales, exchanges or payments received by any virtual currency or other	___	___
• 1099-R	IRA or Pension Distributions	___	___
• 1099-S	Gross Proceeds from Sale of Real Estate-include both the purchase and sale settlement statements	___	___
• 1099-SSA	Social Security Benefits	___	___
• 1099-G	Unemployment Compensation	___	___
• K-1	Partnership, S-Corp, Trust and Estates	___	___
• Rental	Rents received and expenses by category for each property, # of days rented/personal days	___	___
• 1099-NEC/ MISC	Self-employment income (gross receipts, expenses subtotaled by category, list of equipment purchased during the year)	___	___
• Other	State Tax Refunds, Alimony, Directors Fees, Prizes, Jury Fees	___	___

Itemized Deductions:

	Attached	N/A
• Out-of-pocket medical/insurance costs if >7.5% of income, subtotaled by type of cost **MED COST INFO**	___	___
• Long Term Care insurance premiums paid	___	___
• Personal property taxes paid during tax year (cars, boats, campers, etc.)	___	___
• Real estate taxes paid during tax year (if not paid by mortgage company)	___	___
• 1098 - Mortgage interest statement	___	___
• Home Equity Line-if obtained a new equity line in the year **provide purpose of loan**	___	___
• Closing statement from a refinance of mortgage	___	___
• Charitable contributions paid by check during the year or any contributions to DAF	___	___
• Non-cash donations if total is $500 or more, provide details as noted **NON-CASH DONATION INFO**	___	___
• 1098-C if vehicle donated	___	___

Other Adjustments:

	Attached	N/A
• IRA\SEP or Roth IRA contributions (contributions outside of employer plans)	___	___
• Alimony paid or received (for divorces final prior to Jan 1, 2019)	___	___
• 1098-E Student loan interest	___	___
• Educator expenses up to $800 (for teachers)		
• Qualified charitable distribution (QCD) made directly from Traditional IRA	___	___

Miscellaneous:

	Attached	N/A
• 1095 A Marketplace Health insurance form	___	___
• Childcare paid and statement from provider with name, address, tax ID and amount	___	___
• 1098-T for Tuition paid to each institution, plus amounts paid for books and other related expenses **and** itemized statement of activity from student's university account	___	___
• Form 1099-Q showing distributions from 529 college savings plans	___	___
• Contributions to home state college savings plans that you own -Total paid to each student account	___	___
• Estimated federal and state taxes paid? List of dates paid, amounts and payees	___	___

Updated for 2024