**Tax Preparation Checklist**

**Personal Information (If you are returning client and no information has changed, you can leave dates of birth and social security numbers blank for security purposes)**

**If you are a new client, please provide a copy of your previous TWO years of federal tax returns.**

Full Name:      Date of Birth:Click or tap to enter a date.

Street Address:

Social security number:      Occupation:

Phone #:      E-mail Address:

**Driver’s License Information – State: Number: Expiration:**

Were you legally married as of December 31, 2024? YESNO

If married, Spouse’s name:

Date of Birth: Click or tap to enter a date. SSN:       Occupation:

**Spouse’s License Information – State: Number: Expiration:**

Do you want $3 of your tax to go to the Presidential Election Fund? YESNO Does anyone claim you as a dependent? YESNO

Do you have any children that you may claim as a dependent? YESNO   
If so, dates of birth and social security numbers (Please check the LWY box if the child lives with you.):

Name:      DOB:      SSN      LWY

Name:      DOB:      SSN      LWYName:      DOB:      SSN      LWY

Are the children in any type of childcare? YESNO

Childcare provider and amount paid: (including the provider's name, address, and Tax ID number):  
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Did your employer reimburse you for any of this care? YESNO

Did anyone else (other than your spouse or children) live in your home at some point during

the year or did you provide support to anyone who did not live with you? YESNO

**Income (Please provide all forms also: W-2’s, 1099’s, K-1s, etc)**

Did you receive income this year from work that you did as an employee? YESNO

Did you have more than one job this year? YESNO

If yes, which one best describes the situation? Change Jobs Second Job Both

Did you receive income this year from work you did as an independent contractor? YESNO Did you receive any retirement income (401K, Pension, IRA, or Social Security income)? YESNO

Were you required to take a required minimum distribution (RMD) in 2024? YESNO

To the best of your knowledge, did your employer make changes to your 401K? YESNO

Did you receive disability or pension benefits from the Dept of Veteran’s Affairs? YESNO

Did you receive any savings or investment income (interest or dividends)? YESNO

Did you sell any investments this year? Please provide 1099-B form. YESNO Did you have your own business during the year (self-employed)? YESNO

If yes, did this business provide healthcare to you or your employees? YESNO

Are you a stakeholder in a partnership or S-Corporation? YESNO

Did you receive alimony from an ex-spouse? YESNO

Did you collect unemployment during the year? YESNO Did you rent real estate to someone else this year? YESNO

Did you sell any rental real estate this year? YESNO

Did you have any gambling winnings or losses this year, including prizes and awards? YESNO Did you receive an inheritance this year? YESNO

Did you sell a home in 2024? If so, was it your primary residence? YESNO

Was your home foreclosed upon during the year or did you declare bankruptcy in 2024? YESNO Did you have any mortgage or other debt forgiven by a lender in 2024? (1099-C) YESNO

Did you have any student loan debt forgiven in 2024? YESNO

Did you engage in any transactions involving virtual currency or NFTs in 2024? YESNO

Did you receive any other income not mentioned above? YESNO

If so, describe:

**Deductions**

If you paid alimony, amount paid and ex-spouse's social security number:

Name:      SSN:      Amount Paid:

Was this alimony agreement entered into before 1/1/2019? YESNO

Are you an active member of the military? YESNO

If so, did you move because of an active military order? YESNO

Did you, your spouse, or any of your children take any classes this year? YESNO

If so, were they full-time students? YESNO

(Please provide all education bills, and/or 1098-T forms)  
Did they receive any scholarships this year? YESNO

Did you invest or remove any money from a 529 educational savings plan this year? YESNO

Did you or your spouse invest any money into a retirement plan this year? YESNO

(Please provide all statements from your retirement plans)

Did you make payments on any student loans this year (reported on 1098-E)? YESNO

Did you contribute to an FSA, HSA, or Archer MSA in 2024? (1099-SA and 5498-SA) YESNO

**Itemizing Deductions**  
What is your current living situation? OWN RENT OTHER  
 If you own your home, please include 1098 from mortgage company.

If your property taxes are not included in your mortgage, how much did you pay?

Do you pay mortgage insurance (PMI) on your property? If so, how much did you pay?

Do you have a home equity loan or line of credit? YESNO

What was the money received from the loan used for?

If you rent your home, how much is your monthly rent?

How long did you live in this home this year?

Did you make any donations to charity this year? YESNO

Did you pay any medical expenses this year that you were not reimbursed for? YESNO

If so, how much? (Please separate by Doctors, Dentists, and Pharmacy)

Did you incur any mileage related to these visits? If yes how many:      YESNO

How much did you pay to have your tax return prepared last year?

**Health Coverage (this is for New Jersey state returns only)**

Did all individuals on your tax return (Taxpayer, Spouse, and Dependents) have

healthcare coverage throughout calendar year 2024? YESNO

Who provided this coverage (check all that apply)?

Employer Self  Government Healthcare Marketplace

**(Please provide all forms 1095-A, B, or C that you received)**

Did you receive an Advanced Premium Tax Credit for any of the coverage listed above? YESNO

Please provide the name(s) and policy number(s) of the healthcare insurance provider(s)

If you answered “No” to the first question, please explain who did not have coverage, for how long, and the reason that there was no coverage.

**“NEW FOR 2024” Items:**

Did you install energy-efficient windows, insulation, a/c, furnace or water heater,

exterior doors, new electric panel, or had an energy audit done? YESNO

Did you receive form 1099-K from any third-party payment processor (Ebay, Venmo)? YESNO

Did you purchase a new or used electric, plug-in hybrid, or fuel-cell vehicle in 2024? YESNO

Did you roll over any 529 contributions to a Roth IRA? YESNO

**Refund Direct Deposit**

If you would like your refund direct deposited, please provide the routing and account number of your financial institution (**If it is the same account as last year, just write SAME**):

Routing #:    Account #:

Please provide any other information or questions you might have that you feel is relevant to your tax situation:

I attest that the information provided above is true and accurate to the best of my knowledge.

Signature\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_