

# 2024 Income Tax Checklist

## General Information

- ☐ Change of Address or contact info, including e-mail address
- ☐ Change of filing status
- ☐ Name, SSN, & birthdates for any new dependents
- ☐ Verify all dependents to be claimed
- ☐ Proof of Health Insurance (1095-A Marketplace Insurance, Health Insurance Card)

## Income Sources

- ☐ W-2
- ☐ 1099's (Retirement Distributions or contract work)
- ☐ Investment Income 1099-B/1099-DIV
- ☐ Social Security Statement 1099-SSA
- ☐ Partnership, Trust, S Corporation Income K-1
- ☐ Self-employed. Statement of income & expenses (profit & loss, balance sheet)
- ☐ Interest Income 1099-INT
- ☐ State Income Tax Refund(s) 1099-G

## Deductions

- ☐ HSA Distributions 1099-SA / Contributions 5498-SA
- ☐ Mortgage interest & insurance 1098-MORT
- ☐ Real Estate Taxes
- ☐ IRA/Retirement Contributions form 5498
- ☐ Charitable Contributions (Church donations or other qualified charities)
- ☐ Child Care Expenses (Statement that includes the EIN of the provider)
- ☐ Tuition Statement 1098-T
- ☐ Health Insurance Expenses (Doctors, Dentist, Prescriptions, etc...)
- ☐ Employment Related Expenses (Dues, tools, uniforms, travel, etc...)
- ☐ Investment Expenses (Broker fees, etc...)

## Additional Schedules

- ☐ Sale/purchase of a home (Date purchased, sold. Purchase price, Sales price)
- ☐ Rental Property (Income & expenses)
- ☐ Office in the Home (total square feet of home/business use sq footage)
- ☐ Mileage (business vs personal)
- ☐ Other items pertinent to income or deductions on the return

**Portal Instructions:** Please send an email to [portal@dbntax.com](mailto:portal@dbntax.com) requesting access to the portal with your full name, updated address, current email address, and phone number. Within 48 hrs. you will receive a response with instructions for logging in and establishing a password. Please bookmark the site so that you can easily navigate back to it once you have your documents.

**Our calendar is filling fast, but we always have room to assist your friends and family.  
What is better than tax savings for the holidays!**