



## 2024 Tax return checklist

Taxes are generally very consistent. You should always start your current year tax preparation by reviewing your prior year tax filing.

This checklist should not be used for someone who operates a business.

	Prior Year	Current Year
<b>Income:</b>		
Wages (IRS W-2)		
Interest Income (IRS 1099-INT)		
Dividend Income (IRS 1099-DIV)		
Brokerage Statements (Form 1099-A,B,S)		
IRA/Pension/Annuity Income (IRS 1099R)		
Schedule K-1s (IRS K-1)		
Miscellaneous Income and Adjustments (IRS-1099-MISC, NEC, G)		
Rent and Royalty Income		
<b>Itemized Deductions:</b>		
Medical/Dental Expenses		
Real Estate Taxes		
Property Taxes		
Mortgage Interest (Form 1098)		
Charitable Contributions		
<b>Other:</b>		
Estimated Tax Payments		

\* Provide any tax related information not listed above, e.g. new brokerage statements, K-1 investments, etc.

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