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WORKING WITH YOU

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FY 2024

Individual Taxpayer Abbreviated Checklist

Taypayer Name(s): ____

*****SOME TAX DOCUMENTS ONLY AVAILABLE ONLINE**

MOST COMMON TAX ITEMS- SEE DETAILED CHECKLIST FOR COMPREHENSIVE LIST

Income/Deduction	Tax Document	Common Description	Applies
Wages/Salary	W-2	$$ earned from a job	☐
Interest Income	1099-INT	interest earned from bank or investment accounts	☐
Dividend Income	1099-DIV	Dividends earned from bank or investment accounts	☐
Investment Income	1099-B	Gains/losses from sale of investments	☐
Retirement Income	1099-R	IRA/401k/Pension withdrawal (or rollover)	☐
Social Security	SSA-1099	Social security or disability income	☐
Unemployment	1099-G	$$ from government unemployment	☐
HSA/MSA	1099-SA	Distribution from health savings account	☐
Gambling	W2-G	Winnings from lottery/gambling	☐
Entity Income	K-1	Partnership, S-corp or Trust income/loss	☐
Property Sale	1099-S	Proceeds from real estate sale	☐
Debt Cancellation	1099-C	Creditor writes off debt you owe them	☐
Alimony	divorce agreement	$$ paid by ex-spouse excluding division of marital assets & child support	☐
Business/Rental Income	1099-NEC 1099-MISC	Contractor, sole proprietor or rental income- use separate template/consult LCT	☐
Health Insurance	1099-HC 1095-A	proof of health insurance coverage for MA return. Health Connector insurance must provide 1095-A to file	☐
Tuition	1098-T	$$ paid for college expenses (restrictions apply)	☐
Student Loan Interest	1098-E	Interest paid on college loans	☐
Childcare	Receipts	daycare, aftercare, camps for dependents ages 0-12. Need $$ for each provider broken down by kid	☐
IRA Deduction	5498	Contributions if not covered by employer retirement plan	☐
Energy Improvements	Invoices	Solar, Heating, Insulation, Windows/Doors	☐
Other	Invoices	septic, lead, electric cars, adoption	☐
Medical Expenses	Receipts	medical/dental expenses not reimbursed or pre-tax, including mileage (provide total miles)	☐
Mortgage Interest	1098	Interest paid on primary/secondary home loans	☐
Taxes	Invoices	Real estate, excise, local, sales taxes ($10k limit)	☐
Charity	Receipts	Cash & Noncash charity (provide separate totals)	☐
Gambling Losses	Receipts	Total loss on lottery/gambling (save proof)	☐
Massachusetts	Receipts	Rent expense, tolls/parking/commuter pass (W-2 employees)	☐
MA Sr. Circuit Breaker Credit	Receipts	water & sewer paid, real estate taxes paid, rent paid	☐