

2024 TAX CHECKLIST

Provide this completed Tax Checklist along with your tax documents to your Tax Preparer. The numbers below correspond to last year's 1040 tax return. Use that return to help you fill this out for 2024. For any questions, reach out to your tax preparer or your LifePlan team at client@lifeplangroup.com.

Yes No

- Is all your Personal Information, filing status, etc. on top of your 2023 return the same this year?
If no, what changed: _____

Check the boxes for any **income** sources in 2024. For any checked boxes submit the proper tax document(s).

- | | | |
|--|---|---|
| <input type="checkbox"/> 1a: W-2 Income | <input type="checkbox"/> 4a: IRA Distributions | <input type="checkbox"/> 8: Sch. 1 Rental Income* |
| <input type="checkbox"/> 1b-i: Specialty Income (Rare) | <input type="checkbox"/> 5a: Pensions or Annuities | <input type="checkbox"/> 8: Sch. 1 Business Income* |
| <input type="checkbox"/> 2a&b: Interest Income | <input type="checkbox"/> 6a: Social Security Benefits | <input type="checkbox"/> 8: Other Sch. 1 Income |
| <input type="checkbox"/> 3a&b: Dividends | <input type="checkbox"/> 7: Capital Gains | <i>*Provide Documentation for Sch E/C</i> |

Yes No

- IRA/SEP contribution completed (or want to)? Details: _____
- ROTH **contribution** completed (or want to)? Details: _____
- ROTH **conversion** completed? Amount & Date: _____
- If older than 70.5, Any IRA charitable gifts (QCD)? Total Amount: _____
- Are you claiming the Standard Deduction? If no, Submit a Schedule A to itemize deductions
- Any credits to report? Education, Energy, Home Efficiency, etc. See Schedule 3. If yes, Details: _____
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- Had Affordable Healthcare Act Insurance (Obamacare/Exchange)? If yes, provide 1095-A
- Sell, purchase or refinance any real estate? If yes, provide closing statement, etc.
- Make gifts of over \$18,000 to any one individual?*
- Contribute to a Health Savings Account (HAS) **outside** of payroll (uncommon)?*
- Provide or receive any Alimony payments?*
- Have you been notified by the IRS or State of changes to previously submitted tax return?*
- Bought or sold any cryptocurrency?*
- If yes on any * please provide details: _____
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- Did you make any estimated/quarterly payments (Federal or State) for 2024? If yes, provide below:

	Quarter 1	Quarter 2	Quarter 3	Quarter 4
Fed Amt & Date	_____	_____	_____	_____
State Amt & Date	_____	_____	_____	_____

- Do you want a refund applied to next year? If yes, how much? \$ _____ Or _____ %
For any refund not applied to next year, how would you like to receive it? Check only one.
- Same account as last year's tax return (see line 35 on 2023 1040)
- Different account: Rout# _____ Acct# _____ Checking OR Savings
- Have it mailed to my address on the return (not recommended)
- I'm confident I will owe, the above is not necessary!
- I have other tax items/details not notated above that I will share directly with my tax preparer

