

New Client
Tax Preparation Checklist
K2 Services Inc

MUST PROVIDE:

Copy of Previous Year Tax Return
Social Security Numbers (including spouse & children)

Drivers License
Bank Info for Direct Deposit
Proof of Medical Coverage (1095-A, 1095-B, or 1095-C)

Income

- W-2's for 2024 Tax Year
- Unemployment Compensation
- Interest Income (1099-INT)
- Dividend Income (1099-DIV)
- Pensions & Annuities (1099-R)
- SSI Statement
- Alimony Received
- Tax Refunds
- Gambling/ Lottery Winnings (W2-G) Misc. Income (including rent; 1099-MISC)
- Student Loan Interest Paid (1098-E)
- Education (1098-T)
- Self-Employment Data (1099-NEC)
- Business Profit & Loss Statement
- K-1 (S Corps & Partnerships)

Deductions

- Medical Expenses (Total)
- Estimated Tax Payments Made in 2024
- Sales Tax for Large Purchases (Cars, Boats, etc.)
- Real Estate Taxes Paid
- DMV Registration Fees
- Mortgage Interest (1st or 2nd Mtg; 1098-INT)
- Real Estate Transactions (1099-S) Final Escrow Closing Statement (HUD) if you sold a home
- Receipts for Goods Donated to Charity
- Monetary Gifts to Charity/ Church Child Care Expenses (including providers phone #, address, & TIN)
- Alimony Paid (including SSN of recipient)