

Tax Appointment Worksheet

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The tax appointment worksheet is a tool to help you gather the needed information for new and returning clients for the 2024 tax year. This year's worksheet has been enhanced to reflect the changes in tax law. The Corporate Transparency Act is one of those changes that became effective in 2024.

Some forms may need to be downloaded from provider if not received in the mail.

Driver's license/picture identification (ID) needed.

| Event | | Documents or information needed | Event | | Documents or information needed |
|-------|-------------------------------------|--|-------|--|---|
| 1 | Got married, divorced, or separated | <ul style="list-style-type: none"> Married – Prior year return of both spouses Divorced – Finalized date; copy of the divorce decree Separated – Copy of the separate maintenance agreement Community property income allocation | 10 | Sale of stocks, bonds, etc. (including mergers), cryptocurrency | <ul style="list-style-type: none"> Form 1099-B or other sale documents; basis or original costs |
| | Date of event _____ | | 11 | Purchase of stocks, bonds, etc., personal residence, or other real estate | |
| 2 | Children - Birth or adoption | <ul style="list-style-type: none"> Social Security cards and adoption papers Expenses date and amount, date of adoption, special needs certification. Proof child lives in household | 12 | Inheritance | <ul style="list-style-type: none"> Will; Schedule K-1 from the estate, basis information Cash or property in excess of \$18,000 per person. Description of property given, basis, donee name: Property – Basis in hands of donor |
| | Adoption credit | | 13 | Trade of real property | |
| | Child tax credit, EIC, HH | | 13 | Trade of real property | |
| 3 | Death of child or spouse | <ul style="list-style-type: none"> Date of occupancy and relationship Start date Name of new employer Forms W-2 from new and old employers Unemployment form (may need to be downloaded) Type of plan Amount of contribution – Form 1099-R: Rollovers, Roth conversions, inheritance RMD information if age 73 or older as of Dec. 31 Direct transfer to charity? Yes Amt: Brokerage statement showing transfer | 14 | Trade in of personal property used for business (ex. auto) (Deemed sale) | <ul style="list-style-type: none"> Date of trade, property given up, property received, basis and FMV; qualified intermediary sales agreements or closing papers Date of trade, value received for trade in, cost basis of property given up Formation or termination dates: Property contributions or distributions: Schedules K-1, if applicable: Forms 1099-K received for credit card or PayPal type payments: Inventory numbers, if applicable: Mileage information: |
| 4 | Additional members of household | | 15 | Start or end a small business (Schedule C, LLC, S or C corp., Partnership) | |
| 5 | Job change | | 15 | Business income/ Expenses | |
| 6 | Unemployment | <ul style="list-style-type: none"> Form 1099-SSA | 16 | Lawsuit settlements | <ul style="list-style-type: none"> Date received; reason for the settlement; Form 1099-MISC |
| 7 | Retirement contribution | | 16 | Rental property | |
| 8 | Retirement distributions | | | | <ul style="list-style-type: none"> Income; expenses; new property purchased |
| | Transfers from IRAs to charities | | | | |
| 9 | Social Security benefits | | | | |

| Event | | Documents or information needed | Event | | Documents or information needed |
|-------|---|---|-------|---|--|
| 17 | Prizes | <ul style="list-style-type: none"> Form 1099-MISC; value of prizes not included on Form 1099-MISC | 25 | Educational expenses | <ul style="list-style-type: none"> Form 1098-T for student: Actual expense records for books, etc.: Financial transcript from school needed: Form 1099Q – Distribution from 529 Plans: |
| 18 | Lottery or gambling winnings | <ul style="list-style-type: none"> Forms W-2G, losses and other winnings | | Student loan interest | <ul style="list-style-type: none"> Interest record for student loans; Form 1098-E |
| 19 | Health insurance, medical, dental, or drug expenses | <ul style="list-style-type: none"> Health insurance premiums; post-tax payments; totals of other medical, dental, and drug expenses. If the health insurance is pre-tax (i.e., cafeteria plan, §125, POP), premiums have already been deducted from the wage. Health Savings Account (HSA) (Form 1099-SA) information. | 26 | Child or disabled spouse care | <ul style="list-style-type: none"> Name, address, and ID number of the daycare provider; the amount paid to the provider; if the provider comes into your home. |
| | Medical miles (21 cents per mile) | <ul style="list-style-type: none"> Total medical miles driven during the year January-December | 27 | Energy credit | <ul style="list-style-type: none"> Information regarding the purchase of qualified energy property for residential and commercial use such as electric vehicles, furnaces, exterior doors, and windows. |
| | Market place health insurance coverage verification | <ul style="list-style-type: none"> Form 1095 A, B, or C must be received from the marketplace, the insurance carrier, or your employer for every person included on the tax return. | 28 | Bankruptcy filing | <ul style="list-style-type: none"> Date filed _____ Bankruptcy papers - property rejected/ returned by court |
| 20 | State taxes paid: income; property taxes; sales tax on vehicles, motorcycles, or homes | <ul style="list-style-type: none"> Prior year's income tax return; property tax bills; closing papers from the purchase or sale of property; letter from the state regarding any change in a prior filed return. | 29 | Debt forgiveness or abandonment of property | <ul style="list-style-type: none"> Form 1099-A for abandonment Date property was taken by the bank or sold in foreclosure. Form 1099-C for cancellation |
| 21 | Home mortgage interest | <ul style="list-style-type: none"> Forms 1098: Description of use of money | 30 | IRS or state communications | <ul style="list-style-type: none"> Letters, additional taxes paid, changes in prior year returns, installment agreements or offers in compromise |
| 22 | First-time homebuyer | <ul style="list-style-type: none"> Distribution from IRA? Amt: | | Identity Protection PIN (5 digits) | <ul style="list-style-type: none"> Letter including IP PIN. Or information from ID.ME (IRS) |
| | Recapture/Repayment 2008 credit | <ul style="list-style-type: none"> Sale or change in use; record of amount repaid Year 15 (2024 will be the final year!) | 31 | Government money | <ul style="list-style-type: none"> ERC, PPP, grants, loan forgiveness documents |
| 23 | Charitable contributions of money, property, or out-of-pocket expenses | <ul style="list-style-type: none"> Date and type of contributions, knowledge that receipts from the organizations have been received; statement regarding whether goods and service were received for donation; mileage log for charitable work. Form 1098-C for vehicle or boat donations: | 32 | Foreign investments or holdings | <ul style="list-style-type: none"> Any foreign accounts? Total exceed \$10,000 at any time during the year? Foreign business interests or stock of \$50,000 or more? Signature authority over foreign accounts? |
| | Charitable miles (14 cents per mile) | <ul style="list-style-type: none"> Total driven _____ miles | 33 | Digital Assets (Cryptocurrency) | <ul style="list-style-type: none"> Buy, sell, receive, exchange, or dispose of? Back up documents (Form 1099-DA for 2025) |
| 24 | Job-related expenses for employees | <ul style="list-style-type: none"> No longer deductible | 34 | Corporate Transparency Act | <ul style="list-style-type: none"> Is your business subject to reporting? If so, have you filed with FinCEN? |
| | Business miles (67 cents per mile) No longer allowable for employees; only for businesses and rentals | <ul style="list-style-type: none"> Total driven per vehicle _____ miles Business driven per vehicle _____ miles | 35 | Federal disaster area | <ul style="list-style-type: none"> Check IRS for most up-to-date list for extended filings. |
| | | | 36 | Educator expenses | <ul style="list-style-type: none"> Eligible educators Schedule K-12, 900 hours worked |
| | | | | Other information | <ul style="list-style-type: none"> Picture ID/Driver's license, banking information. |