2024 TAX SEASON APPOINTMENT CHECKLIST

P&G ACCOUNTING

909-912-0183
pete@pngaccounfing.com

Years

If you are a new client to P&G Accounting please bring your last year's tax return with you.

Returning clients may call me to receive your individual tax organizer with last year's numbers on it to aid you in remembering what you need.

This list contains some of the most common items you will encounter on your return, however it is not a complete list of everything you may need. If you have any questions please call me at 909-912-0183.

PLEASE BRING THIS CHECKLIST AND WITH YOU TO OUR APPOINTMENT

New Clients	*Previous 1-2 years return*	
FAMILY / HOME		
Child / Dependent Care (i.e. day care)	*Federal Tax ID Number (SSN or EIN) of provider*	
	Provider name, address, phone number	
	Amount paid for each child;	
Birth or Adoption	*Social Security Card / Adoption Papers*	
Additional Members of Household	*Dates of Occupancy and relationship*	
Divorced	*Date Finalized, Divorce Decree, Alimony*	
Health Insurance	*Form 1095*	
Purchase or Sale of Home	*Final Closing statement*	
INCOME		
Job / Work	*W-2*	
Job Change	*W-2 from all employers*	
Unemployment	*Form 1099-G*	
Retirement Distributions	*Form 1099 R*	
Social Security Benefits	*Form 1099-SSA*	
Soles of Stocks, Bonds, etc.	*Form 1099-B+Original Purchase Date and Original Cost*	
Sold or Spent	*1099 -DA (digital assets) if received*	
Virtual / Crypto Currencies	*Date Purchased and Cost*	
	Date Sold and Proceeds.	
Cancellation of Debt	*Form 1099-C*	
Self-Employed	*Profit Loss Statement / 1099-NEC*	
Independent Contractor	*Business Miles / Home Office Expenses*	
	Date and Cost of equipment purchased	
Inheritance	*Will, K-1from estate*	
Won / Received Prizes	*Form 1099-Misc*	
Gambling Winnings	*Form W2-G*	
	Log of winnings and losses	

Rental Property	*Previous Tax Return if applicable*	
Rental Income/Expenses	*1099 if received, annual income and expenses*	
Rental Repairs / improvements	*Date, Amount, Type*	
DEDUCTIONS	***AND CREDITS***	
Retirement Contributions	*Form W2 if payroll deduction*	
	Form 5498 IRA Contributions	
	Statements for other contributions	
Mortgage Interest	*Form 1098 from mortgage company*	
Job Related Expenses	*Union Dues, Licenses,,Continuing Education, etc*	
Job Seeking Expenses	*Miles, Resumes, etc (even if you did not get a job)*	
Medical Expenses	*Health Insurance Premiums and total of doctor/dental visits, prescription drugs, and any other medical costs*	
Medical Miles	*Total miles driven for medical purposes*	
Real Estate Tax	*Tax Bil*	
Sales Tax Car	*Purchase contract*	
DMV Fees	*DMV Invoice or receipt*	
Charitable Contributions Cash, Less than $250	*Cancelled check, bank record, or written receipt from charity*	
Cash contribution over $250	*Written receipt from charity*	
Non-Cash, less than $500	*Written receipt from charity or other reliable records*	
Non-Cash, over $500	*written receipt, name and address of charity, date donated and acquired, type of property donated*	
Non Cash over $5,000	*Same as above plus a qualified appraisal*	
Electric Hybrid Vehicle Credit	*Form 15400 from dealership*	
College Tuition Credit	*Form I 098-T and related expenses books, fees, computers, etc.*	
Energy efficient	*Contract / Invoice*	
Home Improvements	*Type of equipment, repair*	
IRS Correspondence	*Copies of any notices, letters, tax bills, etc.*	

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