

Your Name: _____

2024 FEDERAL AND STATE INCOME TAX CHECKLIST

During 2024 did you (or any dependents) have health insurance coverage through the Health Insurance Marketplace for any months (even one)? If "YES," we need your Form(s) 1095-A to prepare your return. [] YES - NO []

During 2024 did you make any taxable purchases from out-of-state firms on which sales tax was **NOT** charged? If "YES," Check here and see page 4 of the 2024 Federal and State Income Tax Organizer. [] YES
If "NO," **IMPORTANT:** By checking "NO," you are certifying that no sales or use tax is due [] NO

At any time in 2024, did you have any assets, accounts or interest in or a signature authority over a financial account in a foreign country including a bank, trust, online gambling, virtual currency, or other financial account that had a value of \$10,000 or more at ANY time during 2024? [] YES - NO []

At any time in 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or financial interest in a digital asset) ?
If "YES," we will need additional information for reporting [] YES
If "NO," **IMPORTANT:** You are certifying that you had no virtual currency transactions [] NO

During 2024 did you pay the cost of **ANY** Medical, Dental, Drug, Vision or Other Health Care Insurance PREMIUMS with "After-Tax" dollars? This includes Medicare Part B and Part D and any other Medical Health Insurance deducted from your Pension or Paycheck. (Please provide details on a separate sheet) [] YES - NO []

During 2024 did you pay the premiums toward a "Tax-Qualified" Long Term Care Insurance Policy? If "YES," you may be able to deduct a part or all of the cost of the insurance on your WI and/or Federal return. [] YES - NO []

During 2024 did you or your employer make any contributions to, or participate in, a qualified **Health Savings Account** (HSA)? If "YES," please include complete details of your HSA and bring any Form 1099-SA or Form 5498-SA that you received. *This is not a Flexible Savings Accounts (FSA) thru your employer*..... [] YES - NO []
IMPORTANT: Check here if you certify that all HSA distributions were used for qualified medical expenses

During 2024 did you process a "Qualified Charitable Distribution" (QCD) from your Traditional IRA account? If "YES," we will need to see the transaction papers from your IRA account to the charitable organization..... [] YES - NO []

During 2024 did you convert money from your traditional IRA account to a ROTH IRA? If "YES," please include complete details of this ROTH IRA Conversion..... [] YES - NO []

During 2024 did you take a distribution from your Roth IRA **AND** you were under age 59 1/2 or had a Roth IRA for less than 5 years at the time of the distribution? If "YES," please include details of your Roth IRA contribution basis. [] YES - NO []

During 2024 did you **CONTRIBUTE** to any retirement plan **AND** have income under \$38,250 if Single, \$57,375 if Head of Household, or \$76,500 if Married? If "YES," you may qualify for the "Retirement Savings Credit." [] YES - NO []

During 2024 did you pay any tuition or related education expenses for yourself, your spouse, or dependents to attend any post-secondary institution? If "YES," you may qualify for a credit for these expenses. Please bring Form 1098-T from the eligible educational institution **AND** the "Billing Account Activity Statement" showing all activity that was paid by you, by loan or by the student along with scholarships and/or grants received. [] YES - NO []

During 2024 did your employer deduct any Dependent or Child Care Benefits from your wages on a before-tax basis? If "YES," we will need the care provider's name, address & ID number. [] YES - NO []

During 2024 did you have any dependents that had "Gross Income" of over \$1,300 (\$400 if self-employed)? If "YES," that dependent may be required to file a 2024 tax return. [] YES - NO []

Were you claimed or will you be claimed as a dependent on anyone else's 2024 Federal or State tax return? If "YES," special rules may apply to you. [] YES - NO []

During 2024 did you **BUY** or **SELL** or **REFINANCE** your home or any other Real Estate? If "YES," we will need the closing papers or settlement statements at the time of your tax interview appointment. [] YES - NO []

(Please sign & date) This qualifies for a \$10 Discount on your fee

I / We certify that I / We have read and answered the questions in this Checklist (**front & back**) to help my tax professional complete the most accurate 2024 Federal and State Income Tax Return.

Taxpayer Signature

Spouse Signature

Date

- During 2024 did you purchase any Qualified Clean Energy Improvements (ie: solar panels) or Residential Home Improvements (ie: energy efficient windows, doors, insulation, furnace, energy audit, etc.)? If "YES," please bring details and your receipts. [] YES - NO []
- During 2024 did you have anything registered as a Limited Liability Company (LLC), Corporation, or S Corporation in any state? [] YES - NO []
 If "YES," have you reported your Beneficial Ownership Information with FinCEN?. [] YES - NO []
- During 2024 did you receive any "Tip" income. If "YES," we will need to know if those tips were reported to your employer and on your W-2 or if they need to be added directly on your return. [] YES - NO []
- During 2024 did you receive income from a Trust or Estate, Corporation, or Partnership? If "YES," you will need a Schedule K-1 to complete your tax return. [] YES - NO []
- During 2024 were you involved in bankruptcy, foreclosure, repossession, or had any debt (including credit cards) cancelled? If "YES," we will need complete details and the tax forms that you received. [] YES - NO []
- During 2024, did you make any charitable contributions of money or goods? If "YES," you must have a receipt or written record from the charity showing the name of the charity, the date, and the amount. [] YES - NO []
- During 2024 did you contribute property such as used clothing, furniture, toys, etc. having a value of \$500 or more to a charitable organization? If "YES," please provide required documentation. [] YES - NO []
- During 2024 did you start a business or purchase a rental property? If "YES," we will need complete details of the closing, Real Estate tax bill, your income and expenses, etc. [] YES - NO []
- During 2024 did you make or receive any gifts of over \$18,000 to or from any one individual? If "YES," the donor would be required to file a "Gift Tax" return. [] YES - NO []
- At the end of 2024 did you hold any U.S. Savings Bonds that were issued in 1994 or earlier? If "YES," those bonds have reached final maturity and all accrued interest must be reported. [] YES - NO []
- During 2024 did you pay interest on a qualified student loan? If "YES," you may be able to deduct up to \$2,500 of that interest. Please bring any Form 1098-E you receive (*Some may only be available online*) [] YES - NO []
- During 2024 did you make a contribution to Wisconsin's "EdVest" or "Tomorrow's Scholar" College Savings Plans? If "YES," we will need the 2024 Year-End Statement for each beneficiary. [] YES - NO []
- During 2024 did you pay for any Private School Tuition for grades K-12? If "YES," we will need information about the school and the amount of tuition paid for each student. Please include complete details [] YES - NO []
- During 2024 did you own farmland that qualifies for the Wisconsin Farmland Preservation Credit? If "YES," we will need your '2024' property tax bill. [] YES - NO []
- During 2024 did you receive income from Railroad Unemployment Insurance, Railroad Sickness Benefits, Railroad Retirement Benefits or from Military Retirement Benefits? [] YES - NO []
- During 2024 were you - (**you need all three**) - under "**Minimum Retirement Age**", receiving "Disability" pension income with Distribution Code 3 in Box 7 of your Form 1099R, **AND** retired on **'total and permanent'** disability?. [] YES - NO []
- During 2024 did you receive gambling income from a source located outside Wisconsin? If "YES," you may have to file a return for that state. [] YES - NO []

Questions for your tax professional:
