

"2024" READINESS CHECKLIST

1. If new, need cards showing Social Security Numbers and/or ITINs along with birth dates of all and proof of residency of dependents.
2. Need ALL W-2's, 1099's, 1099-K's and 1098's: those for interest, dividends, investments, tax refunds, self-employment, sales, pensions, IRA rollovers, unemployment, Social Security, 1099-A, 1099-C, and any other income along with those showing mortgage interest paid.
3. Need 1098-T's with the financial transcript from the college showing 2024 education expenses plus cost of books and needed equipment.
4. **IMPORTANT: Bring your last pay statement & your last pension statement - contains necessary information.**
5. Any miscellaneous or other income and related expenses.
6. Contributions to "Traditional" and "Roth" IRAs & Health Savings Accounts, plus 1099-SA for HSA distribution.
7. Payments for health insurance, RX insurance, and DDS insurance.
8. **Property tax statements for both summer and winter 2024 as well as information giving 2024 taxable value of personal residence.**
9. Rent: Need name and address of landlord and amount of rent paid.
10. **E-file:** Need correct bank account number for direct deposit.
11. Need driver's license information for both taxpayer and spouse.
12. Bring your **IRS IP PIN** (Identity Protection) if you have received one.

AFFORDABLE HEALTH CARE (ACA) (Obamacare)

- You need to bring Form 1095-A if you bought insurance through the Marketplace.
- **CORPORATE TRANSPARENCY ACT/BOI-watch for extended due date. Must be filed @ FinCEN by all LLCs, Corporations, S-Corporations, HOAs, Charitable Organizations, any organizations registered with Michigan (LARA) or other state**

► Please provide us with your email address if you have one. Will be used for appointment reminders.

Website: meredithtax.com

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13. Copies of K-1's from partnerships, S Corporations, estates and trusts.
14. Business mileage – Bring start & end odometer readings for 2024 with business miles, interest paid on vehicle, & plates.
15. Year-end statements showing transactions from mutual funds/brokerage accounts. **Important: need all pages**
16. If you bought, sold or refinanced during the year, bring all closing statements.
17. If have foreign bank or retirement accounts, bring 2024 statements.
18. If IRA transferred directly to church or charity, bring proof.
19. Bring a record of the **dates** and **amounts** of any estimated tax payments made, and record of any other payments made.
20. Information needed if had Qualified energy efficient items for your home: windows, doors, insulation, furnace, air conditioner, water heater and so forth.

Bring a list of your questions/issues/concerns for this tax year & future years

THANK YOU

We Appreciate Your Business
At
Meredith Tax Service

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Income Taxes•Electronic Filing•Bookkeeping•Representation•Notary