



# 2024 Individual Tax Return Checklist

**CLIENT INFORMATION:** New clients, fill out completely. Returning clients, fill out for changes.

Client Name: _____	Spouse Name: _____
Client SSN: _____	Spouse SSN: _____
Client Date of Birth: _____	Spouse Date of Birth: _____
Address: _____	Cell #: _____ May we text you at this #? <u>Y</u> <u>N</u>
Email: _____	Other Phone Number(s): _____

**DEPENDENT INFORMATION:**

Dependent #1 Name: _____	Relationship: _____
Dependent SSN & DOB: _____	Months in Home: _____
Dependent #2 Name: _____	Relationship: _____
Dependent SSN & DOB: _____	Months in Home: _____
Dependent # 3 Name: _____	Relationship: _____
Dependent SSN & DOB: _____	Months in Home: _____

**BANKING INFORMATION FOR DIRECT DEPOSIT & DIRECT DEBIT:**

Bank Name: _____	Account Number: _____
Routing _____	Number: Returning Clients, same banking info. as last year? Y N

**INCOME:**

<input type="checkbox"/> W-2s	<input type="checkbox"/> 1099-MISCs	<input type="checkbox"/> 1099-DIVs	<input type="checkbox"/> 1099-Rs	<input type="checkbox"/> 1099-Gs	<input type="checkbox"/> (Unemployment, Etc.)
<input type="checkbox"/> W-2Gs	<input type="checkbox"/> 1099-NECs	<input type="checkbox"/> 1099-INTs	<input type="checkbox"/> SSAs	<input type="checkbox"/> 5498-SA	<input type="checkbox"/> (HSA Contributions)
<input type="checkbox"/> K-1s	<input type="checkbox"/> 1099-B Stock/Property Sales	<input type="checkbox"/> Foreign Income	<input type="checkbox"/> 1099-Ks	<input type="checkbox"/> 1099-SA (HSA Distributions)	
<input type="checkbox"/> Income from Rental Property	<input type="checkbox"/> Hobby Income	<input type="checkbox"/> 1099-Gs Small	<input type="checkbox"/> Business	<input type="checkbox"/> Income	
<input type="checkbox"/> Digital Currency Transactions (Amount Rec'd & Cost)	<input type="checkbox"/> Child Support Received				

**EXPENSES & DEDUCTIONS:**

<input type="checkbox"/> 5498 IRA Contributions	<input type="checkbox"/> Energy-efficient Home	<input type="checkbox"/> Improvements	<input type="checkbox"/> Medical Expenses (7.5% of AGI)
<input type="checkbox"/> Mortgage Interest (1098)	<input type="checkbox"/> Electric Vehicle Purchase Documents	<input type="checkbox"/> Health Insurance Premiums (Medical, Dental, Vision)	
<input type="checkbox"/> Property Tax Statements	<input type="checkbox"/> License & Registration Fees	<input type="checkbox"/> Charitable Contributions	
<input type="checkbox"/> 2024 Taxable Value of Home	<input type="checkbox"/> Educator Expenses	<input type="checkbox"/> Childcare	<input type="checkbox"/> Expenses & Provider Information
<input type="checkbox"/> Estimated Taxes Paid for	<input type="checkbox"/> 2024 Expenses Related to Rental	<input type="checkbox"/> Property Sales Tax on Major Purchases	
<input type="checkbox"/> 1098-T & College Expenses	<input type="checkbox"/> Retirement Plan Documents	<input type="checkbox"/> MI	<input type="checkbox"/> DHHS Stillbirth Certificate

**MISCELLANEOUS INFORMATION:**

- Identity Protection PIN
- # of Days Worked from Home if you LIVE or WORK in a taxable city (Grand Rapids, Walker, East Lansing, Detroit, etc.)
- Required 1095-A if you had Marketplace Health Insurance in 2024
- Closing Statement from Home Sale if sold in 2024
- Copy of Valid Driver's License or State ID
- Copy of previous year's tax return if VDTA did not prepare it

If you have questions, please visit our website, send us an email, or give us a call! [www.vdtapro.com](http://www.vdtapro.com)  
[info@vdtapro.com](mailto:info@vdtapro.com) (616) 840-6352

\*This list intended to be an outline, not an all inclusive list. Additional information may be needed for some clients to complete their tax return.