

# BRIGHT FUTURE

FINANCIAL SERVICES

## Tax Year 2024 Checklist

### INCOME

W-2 Wage/Salaries/Tips \_\_\_\_\_  
1099-INT Interest \_\_\_\_\_  
1099-DIV Dividends \_\_\_\_\_  
1099-MISC Self-Employment \_\_\_\_\_  
1099-R Pension, IRA, Rollover \_\_\_\_\_  
W-2G Gambling, Lottery \_\_\_\_\_  
1099-C Cancellation of Debt \_\_\_\_\_  
1099-G Unemployment \_\_\_\_\_  
1099-G State/City Tax Refund \_\_\_\_\_  
1099-B Capital Gains/Losses \_\_\_\_\_  
1099-S Property Sale \_\_\_\_\_  
1099-Q Education (529 Plan) \_\_\_\_\_  
1099-SA HSA Disbursement \_\_\_\_\_  
K-1 for \_\_\_\_\_  
    Partnerships \_\_\_\_\_  
    S-Corporation \_\_\_\_\_  
    Trust \_\_\_\_\_  
    Estate \_\_\_\_\_  
SSA-1099 Social Security \_\_\_\_\_  
RRB-1099 Railroad Retirement \_\_\_\_\_  
Alimony (only if divorce final before 1/1/2020) \_\_\_\_\_  
Rental Real Estate \_\_\_\_\_  
Scholarships/Fellowships \_\_\_\_\_  
Jury Duty \_\_\_\_\_  
Tax Exempt Interest \_\_\_\_\_  
Property Tax Rebate Recovery \_\_\_\_\_  
Foreign Earned Income \_\_\_\_\_  
Homebuyer Credit Recovery \_\_\_\_\_  
Gig Work (Airbnb, Uber, Taskrabbit, etc) \_\_\_\_\_  
OTHER INCOME \_\_\_\_\_  
**DEDUCTIONS/CREDITS/TAXES**  
1098-E: Student Loan Interest \_\_\_\_\_  
1098-T: College Tuition/Fees/Books \_\_\_\_\_

### DEDUCTIONS/CREDITS/TAXES CONTINUED

1095-A: Health Ins. Reporting \_\_\_\_\_  
Alimony Paid (only if divorce final before 1/1/2019) \_\_\_\_\_  
Childcare/Day Camp Expenses (child <13) \_\_\_\_\_  
(We need provider's name, address, and tax ID number)  
Household Employers (Nanny Tax) \_\_\_\_\_  
IRA/SEP/SIMPLE Contributions \_\_\_\_\_  
Roth IRA Contributions or Conversion \_\_\_\_\_  
Teacher's Classroom Expenses \_\_\_\_\_  
HSA Contributions \_\_\_\_\_  
Adoption Expenses \_\_\_\_\_  
Self-Employed Health Insurance Premiums \_\_\_\_\_  
Retirement Saver's Credit \_\_\_\_\_

### ITEMIZED DEDUCTIONS

#### **Medical, Dental, & Optical**

(Medical total must exceed 7.5% of income to be deductible)

Prescription Drugs \_\_\_\_\_  
Health Insurance Premiums (you paid) \_\_\_\_\_  
Long Term Care Insurance \_\_\_\_\_  
Number of Medical Miles \_\_\_\_\_  
Doctor, Dental, Hospital and Lab Fees \_\_\_\_\_  
Vision, Eyeglasses and Contacts \_\_\_\_\_  
Nursing Home Care \_\_\_\_\_  
Special Needs Education \_\_\_\_\_

#### **Taxes Paid**

(Taxes paid total now capped at \$10,000)

Sales Tax (cars, boats, RVs) \_\_\_\_\_  
Primary Residence Prop Taxes \_\_\_\_\_  
Other Property Taxes (land, second home) \_\_\_\_\_  
Auto License Plate Registration \_\_\_\_\_  
Home Mortgage Interest (Form 1098) \_\_\_\_\_  
Home Equity Loans (Form 1098) \_\_\_\_\_  
(must be used to buy/build/improve property securing debt)  
Investment Loans \_\_\_\_\_  
Mortgage Insurance Premiums \_\_\_\_\_

#### **Contributions**

Cash, Check, and Payroll Deductions \_\_\_\_\_  
(Each donation of \$250+ needs written acknowledgement from charity)  
Goods \_\_\_\_\_  
(If over \$500, you must have a list of donated items, charity address, and date of donation. If over \$5,000, you need appraisal)  
Volunteer Expenses / Mileage \_\_\_\_\_