

Haynes Business Services

Tax Prep List for 2024

Basics For All Filers:	Social Security Cards (yourself & dependents) Copy of Last Year's Tax Return (If you are a new client) Date of Birth Bank Account/Routing Number Copy of Driver's License Stimulus Payment Information Child Tax Credit Payment Information
Income:	W-2s 1099s for all forms of income (SSA, R, G, K, NEC) K-1 Interest Schedule C w/ expenses
Deductions:	Health Insurance Payments IRA and HAS Contributions Vehicle Purchase Sales Tax Educational Expenses 1098T (loan interest/tuition) Childcare Expenses Amount Paid for Last Year's Tax Prep
Donations:	Charitable Contributions
Home & Rental Properties:	1098s: Interest on Mortgage & Equity Loans Paid Real Estate Taxes Purchase/Sale Records Rental Income Receipts for upgrades, repairs, etc. Energy Efficient Upgrades Receipts
Other MISC:	Record of Estimated Tax Payments IRA/401K Total Contributions
For Business Owners:	Tax ID Number Business Income and Expenses List of All Assets and Equipment All Loan Balances w/ Interest Paid Assets Bought and Sold Mileage Logs Insurance Premiums and/or expenses

