

# 2024 Income Tax Return

## 1. Family's Personal Information

Relationship	Legal Name		Date of Birth (MM/DD/YYYY)	Tax ID Number (SSN or ITIN)	Occupation	Remarks
	Last	First				
self						

## 2. Address and Contact Information - **Address Changed?** : Yes    No

Address		City / State / ZIP	
Telephone		E.mail	

## 3. Check List

**\* Last Year's Tax Return - Hard Copy or PDF File**

\* Did you pay estimated tax to Federal or State during 2024? If any, scribe paid amount and date

=>

\* Did you have any health insurance coverage during 2024? if yes, scribe the period

=> Not Covered?    OR    Full year Covered?    OR    Covered Months? From(month)    thru(month)

\* Did you have insurance from Covered California(Obama care) at any time in 2024?    Yes    No

=> if yes, bring or attach **Form 1095-A(Federal) & Form FTB 3895(California)**, Health Insurance Marketplace Statement

\* **Bank Information(Routing No & Account No or Void Check) for Direct Deposit or Debit (Tax refund or Owed)**

=> Bank Name/ Routing No + Account No :

## 4. Attachments - Copy or Scanned Documents)

\* **W2's** from each employer you worked for

\* **All 1099's** received

- - 1099-INT for Interest Received
- - 1099-DIV for Dividends received
- - 1099-S for the sale of Real Estate
- - 1099-SSA for Social Security Benefits
- - 1099-R for distributions from pensions, annuities & IRA's
- - 1099-G For Unemployment or Prior Year State Tax Refund
- - 1099-NEC/MISC for Independent Contractor fees

\* **1098 - Mortgage & Home Equity Loan Interest paid - Do not need for Standard Deduction**

\* **Total of all medical and dental expenses - Do not need for Standard Deduction**

\* **Total of child or dependent care expenses**

\* **The amount of property tax you paid during the year - Do not need for Standard Deduction**

\* **List of charitable contributions made during the year - Do not need for Standard Deduction**

\* **List of educational and job-related expenses for the year - Do not need for Standard Deduction**

\* **1098-T (College Tuition), 1098-E(Student Loan Interest)**

\* **A copy of your last car registration notice - Do not need for Standard Deduction**

\* **1099-B, Purchase and Sale information for Stock or Cryptocurrencies**

\* etc. : sch K-1 / 1099-K / W-2G (Gambling WIn) / Foreign Income & Foreign Tax Paid

\*\* This is a inclusive list and not everything will apply to you. Feel free to call us to find out what you will need to bring.