ASCEND
CPA and Advisors, LLC

Due Dates:
4/15/25 & 10/15/25 *(with Extension)*

2024 Individual Income Tax Checklist

GENERAL INFORMATION

	Legal Name	SSN	D/O/B	Occupation	Identity Protection Pin
Taxpayer					
Spouse					

Address _____

Telephone _____ **Email address** _____

Bank Information for Direct Deposit/ACH
Bank Routing Number _____ ☐ Checking ☐ Savings
Account Number _____

Dependents

	Legal Name	SSN	D/O/B	Relationship
Dependent				
Dependent				
Dependent				
Dependent				
Dependent				

Child Care Provider's Name _____
Child Care Address _____
Child Care Tax ID Number _____ Amount paid $ _____

How would you like to receive your copy of the Tax Return (check one or both)
Printed ☐ Electronic ☐

PERSONAL INFORMATION

☐ Yes ☐ No Did your marital status change during the year?
☐ Yes ☐ No Did your address change during the year?
☐ Yes ☐ No Were there any increases or decreases to the number of dependents in your household?
☐ Yes ☐ No Did you adopt a child under the age of 18? If yes, please include documentation and a list of your costs.
☐ Yes ☐ No Did you have any children under age 18 or full-time students under age 23 at the end of the tax year who earned interest/dividend income or other investment income?
☐ Yes ☐ No **Did you obtain health insurance through the Marketplace? If so, please provide Form 1095-A (IMPORTANT)**

INCOME ITEMS (Please attach relevant documents)

☐ Yes ☐ No W-2s provided by your employer(s)
☐ Yes ☐ No Social Security Benefits (Form SSA-1099)
☐ Yes ☐ No Interest and Dividend Income (Form 1099-Int and Form 1099-Div)
☐ Yes ☐ No Did you receive tax-free interest from Education Savings Bonds? (If yes, please provide the 1099-INT)
☐ Yes ☐ No Did you have an interest in or authority over a financial bank or investment account in a foreign country?
☐ Yes ☐ No Business Income reported on Form 1099-Misc (If yes, please complete Business Tax Checklist)
☐ Yes ☐ No Sale of Stocks, Bonds, or Other Investments (Please provide 1099-B or Alternate Sales Records)
☐ Yes ☐ No Did you make a Work Opportunity Zone Investment to defer capital gains?
☐ Yes ☐ No Did you sell or exchange Cryptocurrency? Please provide report showing cost basis.

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Individual Tax Checklist - Continued

☐ Yes ☐ No Did you purchase a rental property that you leased to a 3rd party? If so please provide the settlement statement and complete the Real Estate Tax Checklist.

☐ Yes ☐ No Did you sell your primary home or an investment property? (Attach Settlement Statement)**(Complete Real Estate Tax Checklist)**

☐ Yes ☐ No IRA/Pension distributions / Rollovers (Form 1099-R and/or Form 5498)

☐ Yes ☐ No State and local tax refunds (Form 1099-G)

☐ Yes ☐ No Unemployment Income (Form 1099-G)

☐ Yes ☐ No Did you receive interest income from a loan you extended to another person?

☐ Yes ☐ No Gambling winnings (Form W2-G/Form 1099); Prize money or in-kind? (If yes, also list gambling losses.)

☐ Yes ☐ No Paid Tuition Expenses (Form 1098-T)

☐ Yes ☐ No Student Loan Interest (Form 1098-E)

☐ Yes ☐ No Cancelled or Forgiven Debts (Form 1099-C) **or** Abandoned Property (Form 1099-A)

☐ Yes ☐ No Distribution from an Education Savings Account or Qualified Tuition Program (Form 1099-Q)

☐ Yes ☐ No Did you make a back door Roth IRA conversion? If yes, provide documentation.

☐ Yes ☐ No Did you receive income from Royalties? (1099)

ESTIMATED INCOME TAX PAYMENTS

☐ Yes ☐ No Did you make any estimated payments for 2024? If yes, please list the amount and date paid below.

Amount	$ _____	Date Paid	_____
Amount	$ _____	Date Paid	_____
Amount	$ _____	Date Paid	_____
Amount	$ _____	Date Paid	_____

ITEMIZED DEDUCTIONS (Please respond and attach documents.)

☐ Yes ☐ No Medical expenses? (e.g. doctor visits, pharmacy, insurance, hospitalization, supplies) $ _____

☐ Yes ☐ No Medical miles? How many miles did you drive to tend to medical/dental needs? _____

☐ Yes ☐ No Did you incur expenses for long term care or pay premiums from long term care insurance? $ _____
If yes, please list amounts paid.

☐ Yes ☐ No Did you purchase a vehicle? If so, how much sales tax was paid? $ _____

☐ Yes ☐ No Real estate taxes paid on primary residence/second home? Please list. $ _____

☐ Yes ☐ No Did you register vehicles? Please list the amount you paid for each. $ _____

☐ Yes ☐ No Mortgage interest and mortgage insurance paid (Form 1098) $ _____

☐ Yes ☐ No Did you pay investment interest? If so, please list. $ _____

☐ Yes ☐ No Did you refinance? If so, please provide a copy of your settlement statement. _____

☐ Yes ☐ No Did you make any charitable **Cash/Check** donations? _____
If yes, attach list of recipients and amounts.

☐ Yes ☐ No Did you donate any in-kind (non-monetary) items to charity that totaled over $500? $ _____
If yes, please provide donation receipts with the fair value of the items at time of donation.

☐ Yes ☐ No Charitable Miles? Please list the number of miles driven for charitable purposes. _____

☐ Yes ☐ No Were you a victim of a qualified disaster resulting in a casualty loss? $ _____
Please describe your damages and the value of the items not paid for by insurance.

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OTHER ITEMS

☐ Yes ☐ No Did you or your spouse contribute to an IRA for tax year 2024? Please list the amount(s). $ _____

☐ Yes ☐ No Did you have unreimbursed employee expenses? Please list.*(Deductible with some states only)* $ _____

☐ Yes ☐ No Did you have unreimbursed military reserve or national guard expenses? Please list. $ _____

☐ Yes ☐ No Did you have unreimbursed expenses if you are an artist who worked for more than 1 employer? _____

☐ Yes ☐ No Did you start or acquire interest in a partnership or S Corporation? (If yes, complete the Business Tax Checklist)

☐ Yes ☐ No Did you purchase or sell your primary home, take a home equity loan, or acquire a second home?
If yes, please attach your settlement statement and any other pertinent documents.

☐ Yes ☐ No Did you purchase an electric vehicle? If yes, please attach the purchase documents. Is the vehicle New or Used?

☐ Yes ☐ No Did you make energy efficient upgrades to your home, including the purchase of solar panels, a natural gas/ propane water heater, air conditioning unit, exterior doors, energy efficient windows, electrical panelboards, circuits/feeders, insulation, biomass stoves, electric heat pump, and skylights? If so, please list the item(s) purchased and cost.

Description of item(s) purchased	Cost
	$
	$
	$
	$
	$

☐ Yes ☐ No Did you, your spouse, or dependents incur any tuition expenses to attend a college, university, or vocational school? **Please attach Form 1098-T.** Please list expenses below:

Books _____
Supplies _____
Computer/Laptop _____
Tuition _____

☐ Yes ☐ No Were you the victim of a natural disaster in 2024? If yes, please provide the location/nature of the disaster and other detail.

_____

☐ Yes ☐ No Were you the victim of fraud in 2024? If yes, please provide detail including the amounts lost and reimbursed by insurance.

_____

RETIREMENT PLANNING

☐ Yes ☐ No Would you like information on how to grow your hard-earned money so that it is available, tax-free when you need it most?

☐ Yes ☐ No Are your beneficiary designations correct? When is the last time they were updated?

☐ Yes ☐ No If you have ever been divorced, did you update your retirement plan beneficiary designations?

☐ Yes ☐ No Have you established a Trust or a Will to ensure that assets are distributed in a manner that you approve.