



CHECKLIST

For 2024 Taxes

(Prepared in 2025)

www.integritytaxgroup.com • help@integritytaxgroup.com

NEW CLIENTS ONLY

- | | |
|---|---|
| <input type="checkbox"/> Copy of Social Security Card | <input type="checkbox"/> Birth Dates for Every Person on the Return |
| <input type="checkbox"/> Spouse's Social Security Card | <input type="checkbox"/> Copy of Last Year's Tax Return Including all States and Cities |
| <input type="checkbox"/> Name & Social Security Numbers of Dependents | <input type="checkbox"/> School District you Live In |

INCOME

- | | |
|--|---|
| <input type="checkbox"/> W-2 Forms from your Employer(s) | <input type="checkbox"/> Social Security/Railroad Ret. (SSA-1099/RRB-1099) |
| <input type="checkbox"/> Self-Employment (Include all Income & Expenses) | <input type="checkbox"/> Rental Income |
| <input type="checkbox"/> Contractor/Subcontractor Income (Form 1099-NEC) | <input type="checkbox"/> Income from Partnerships, S-Corps, Trusts (Schedule K-1) |
| <input type="checkbox"/> Interest from your Bank/Credit Union (Form 1099-INT) | <input type="checkbox"/> Gambling or Lottery Winnings (W-2G or not) |
| <input type="checkbox"/> Dividend Income (Form 1099-DIV) | <input type="checkbox"/> Cryptocurrency Transactions (Gains and Losses) |
| <input type="checkbox"/> Stock Sales Broker Statement and Cost Basis (Form 1099-B) | <input type="checkbox"/> Sale of Any Assets |
| <input type="checkbox"/> Unemployment Income (Form 1099-G) | <input type="checkbox"/> Prizes and Awards |
| <input type="checkbox"/> Pension/Retirement Income (Form 1099-R) | <input type="checkbox"/> Hobby Income |
| <input type="checkbox"/> Cancellation of Debt (Form 1099-C) | <input type="checkbox"/> Alimony Received* |
| <input type="checkbox"/> Credit Card or Payment App Money Received (1099-K) | <input type="checkbox"/> ERC Credits for your Business |

DEDUCTIONS

- | | |
|---|--|
| <input type="checkbox"/> Medical & Dental (if Exceeding 7.5% of Income) | <input type="checkbox"/> Cash & Non-Cash Charitable Donations (must have receipts) |
| <input type="checkbox"/> Taxes Paid to State & City | <input type="checkbox"/> Miles Driven for Charity |
| <input type="checkbox"/> Property Taxes (Amt. PAID in 2024) also see MI Section | <input type="checkbox"/> Casualty Losses (if in a Disaster Area) |
| <input type="checkbox"/> License Tab Fees on Automobiles | <input type="checkbox"/> Major Purchases that you Paid Sales Tax on |
| <input type="checkbox"/> Mortgage Interest/Points/PMI (Form 1098) | <input type="checkbox"/> In-Home Office Deductions (If Self-Employed) |

ADJUSTMENTS & CREDITS

- | | |
|---|---|
| <input type="checkbox"/> Health Savings Account (Form 1099-SA) | <input type="checkbox"/> Student Loan Interest Paid (Form 1098-E) |
| <input type="checkbox"/> Traditional IRA Contributions/Roth Contributions | <input type="checkbox"/> Amt. Paid to Educational Institution
(Form 1098-T and Financial Account Transcript) |
| <input type="checkbox"/> Any Changes in Dependents (Added or Subtracted) | <input type="checkbox"/> Educator Expenses (for Teachers) |
| <input type="checkbox"/> Child Care Provider Name/Address/SS#(or EIN) & Amount Paid | <input type="checkbox"/> Receipts for Energy-Efficient Home Improvements |
| <input type="checkbox"/> Adoption Expenses | <input type="checkbox"/> Electric Vehicle Certificate |
| <input type="checkbox"/> Federal/State Estimated Taxes Paid
(Include canceled checks or bank statements showing payment) | <input type="checkbox"/> Foreign Taxes Paid |

OTHER MISCELLANEOUS INFO

- | | |
|--|---|
| <input type="checkbox"/> Driver's Licenses (Taxpayer and Spouse) | <input type="checkbox"/> Identity Theft PIN (if received) |
| <input type="checkbox"/> If Claiming EIC Credit - We may need proof of residence | <input type="checkbox"/> If you lived or worked in a city with City Tax, how many days? |
| <input type="checkbox"/> Form 8332 for divorce agreement proving your
right to claim a child living with your ex-spouse | <input type="checkbox"/> Direct Deposit Info (Routing and Account #s) if applicable |
| | <input type="checkbox"/> 1095-A Form (Marketplace/Health Insurance Subsidy) |

STATE OF MICHIGAN

- | | |
|---|--|
| <input type="checkbox"/> 2024 Taxable Value of Home | <input type="checkbox"/> Record of Purchase or Sale of Residence (HUD Statement) |
| <input type="checkbox"/> Property Taxes Billed in 2024 (whether paid or not) | <input type="checkbox"/> Contributions to a 529 Plan |
| <input type="checkbox"/> Medical Insurance Premiums paid - if not pre-taxed | <input type="checkbox"/> Child Support Received/SSI Received for Child(ren) |
| <input type="checkbox"/> Rent Paid and Number of Months Spent in Residence (Include Landlord's Name & Phone Number) | |

THIS LIST IS NOT ALL-INCLUSIVE. PLEASE ALSO INCLUDE ANY OTHER PAPERWORK YOU THINK MAY APPLY

*Alimony only needs to be reported if divorce was finalized before January 1, 2019

Revised 12/12/2024