

2024 Tax Breaks Income Tax Checklist

Name:		Social:		Date of Birth:	
Contact Phone:		Email:		Occupation:	
Spouse Name:		Social:		Date of Birth:	
Contact Phone:		Email:		Occupation:	
Address:					
Filing Status:		Single <input type="checkbox"/> Head of household <input type="checkbox"/> Married [] Married filing separate <input type="checkbox"/> Widow <input type="checkbox"/>			
Dependents If you are claiming someone other than a biological relative as a dependent on your tax return, you will need to speak to us directly to answer interview questions. Also include proof of residence for children / Childcare records with the provider's Tax ID / IRS Letter 6419 – To report your advance Child Tax Credit W					
Name:		Relationship	Social	Date of Birth	Attended College Or Childcare
First time with Tax breaks!!! If this is your first year, please attach last year's income tax return.			How where you referred to us or how did you hear about us?		
Please check if you have any of the Income Information, if you mark that you have these, Please attach all forms or list amount spent not listed on forms, if applicable.					
How many W2 Jobs and 1099 forms did you have in 2022?			<input type="checkbox"/> Did you receive unemployment or have back unemployment?		
<input type="checkbox"/> Forms 1099-INT, 1099-DIV, 1099-OID, or 1099-B for income from interest, dividends, and stock sales?			<input type="checkbox"/> Form 1099-S for income from the sale of your residence or other property?		
<input type="checkbox"/> Form 1099-R for income from retirement plans <input type="checkbox"/>			<input type="checkbox"/> Form SSA-1099 for income from Soc Sec benefits		
<input type="checkbox"/> Forms 1099-SA or 1099-LTC for distributions from a Health Saving Account (HSA) or long-term care reimbursements			<input type="checkbox"/> Schedule K-1 for income from a pass-through business, trust, or estate.		
<input type="checkbox"/> Records of any transactions involving cryptocurrency			<input type="checkbox"/> gambling winnings, jury duty pay, cancellation of debt, royalty income, etc.		

Tax Credits and Deductions

☐ Out-of-pocket medical and dental expenses

Premiums paid for long-term care insurance

Expenses for Social Emotion Pet

☐ Form 1095-A if you purchase health insurance through Marketplace

Total Spent\$_____

☐ Records for adoption costs, Include the Name and social security number of the child you legally adopted during the year

Amount spent for fees \$_____

Name_____

Social #_____

☐ Form 1098 showing any mortgage interest, mortgage insurance premiums, and points you paid during the year. Real estate taxes if not shown on the 1098 \$_____

Casualty losses (if you lived or owned property in a federally declared disaster area)\$_____

☐ Taxes paid for your vehicle(s) registration\$_____

☐ Sales tax on Vehicle purchased in 24 \$_____ Was this an electric vehicle? _____

_____ Boats or Other Property Sales tax

☐ Charitable donations (including cash amounts, official charity receipts, value of donated property, etc.)

Noncash\$_____

Cash \$_____ (attach Church forms)

☐ Form 1098-T showing expenses for higher education

☐ Form 1098-E for student loan interest

Any additional fees paid for computer, books, internet school supplies \$_____

Teacher expenses paid for classroom supplies \$_____

☐ Energy Credits

Solar lights, energy efficient house upgrades, use of propane / **Biomass Stoves**

Bank Information for direct deposit: Bank Name_____

Routing _____ Bank Account Number_____

Credit Card Information for Pay in advance or if your refund is garnished the fee will be charged to the card or debited from your account. There is a \$40.00 fee to the take the fee out of the refund.

Credit card #_____ Exp_____ CVC Code_____

Tax Breaks will prepare your Federal and State income tax returns based on the information you furnish to us. It is your (the taxpayers) responsibility to provide all information necessary to complete you tax returns. You represent to us that the information you provide is true, complete and accurate. In addition, you have retained all necessary receipts, written support and/or documentation should it be required by an IRS or State audit examination. If your refund is applied to outstanding debt(s), the tax preparer fee will be debited or charged to the account on file within 5 days. I CERTIFY THAT ALL INFORMATION SUBMITTED TO TAX BREAKS IS CORRECT TO THE BEST OF MY KNOWLEDGE.

Taxpayer signature: _____ Social Security #: _____ Date: _____

Do you have a Personal Identity Pin number issued by the IRS for the year 2021? Pin #_____ (6 digits)

Spouse signature: _____ Social Security # _____ Date: _____

Do you have a Personal Identity Pin number issued by the IRS for the year 2021? Pin #_____ (6 digits)