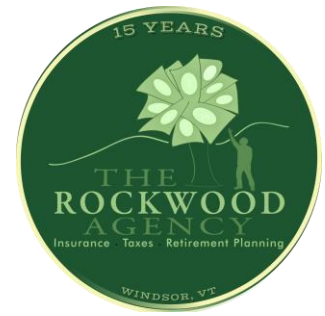


2024 TAX FORM CHECKLIST



POTENTIAL FORMS, DEDUCTIONS, & CREDITS TAX FORM CHECKLIST

Income Info:

Income from Jobs (W2's)
Investment Income
Any 1099 or 1098 forms
Income from State and Local Income Tax Refunds
Alimony Received
VT only – Child Support Received
Business or Farming Income*
IRA/Pension Distributions (1099-R Form)
Rental Property Income*
Unemployment Income (1099-G Form)
Social Security Benefits (1099-SSA Form)
Income from Sales of Property (1099-S or otherwise)
1095 Health Ins. Reporting
Foreign Bank Accts./Foreign Income
Gambling Winnings
Jury Duty
VA Income
Life Insurance Proceeds
Bartering Income
Cash

Adjustments to your Income:

IRA Contributions
Student Loan Interest
Medical Savings Account Contributions
Moving Expenses For A Job (More than 50 Miles)
Contributions to Keogh, SEP, SIMPLE and Other Self-Employed Pension Plans
Educator Expenses

VT Only- Child Support Paid/Alimony
Paid Health Savings Account (HSA
1099-SA)

Itemized Tax Deductions and Credits:

Advance Child Tax Credit Payment
Childcare Costs
Education Costs (1098-T Form, Books & Supplies)
Adoption Costs
Mortgage Interest You Paid
Charitable Donations
Casualty and Theft Losses
Sales Tax and Fee Deductions for New Vehicle Purchases
HUD Statement if Property was Purchased.
Medical and Dental Expenses
Energy-Efficient Home Improvement
Gambling Losses

Taxes You Have Paid:

State and Local Income Taxes
State and Local Sales Taxes
Real Estate Taxes
Personal Property Taxes
Large Purchases Made Out Of State

