2024 Itemized Deductions

2024 Medical Expenses

Medicare Premium	
Medical Insurance	
Long Term Care Insurance	
Doctors	
Dentists	
Orthodontic & Dentures	
Eye Glasses & Contacts	
Hearing Aids & Batteries	
Chiropractors	
Hospitals	
Prescriptions	
Ambulances	
Lab Fees & X-Rays	
Travel Expenses	
Other	
Reimbursements for Above	
Number of Medical Miles	

2024 Taxes Paid

Prior Year State Taxes Paid	
Real Estate Taxes—Residential	
Personal Property Taxes	
Other Taxes Paid	

2024 Interest Paid

Mortgage Interest Paid	
Mortgage Insurance Paid	
Points Paid	
Investment Interest Paid	

2024 Charitable Contributions—Cash

Churches	
Other Charities	
Non-Cash New Items (Food, Etc)	
Other	
Charitable Mileage	

2024 Miscellaneous

Educator Classroom Expenses	
Impairment Related Work Expenses	
Gambling Losses	
Other	

Questions for My Preparer

2024 Estimated Payments Made

Estimated Payments		1st Payment		2nd Payment		3rd Payment		4th Payment	
	2023 Re-fund Applied to 2024	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid	Amount
Federal									
State									
Other									

2024 Tax Document Checklist (Check Documents You Have)

	New Clients	☐	1099Rs for all retirement distributions
☐	Social Security cards for everyone on return	☐	1099 for all Social Security payments
☐	Dates of birth for everyone on the return	☐	1099 for Railroad Retirement payments
☐	Copy of 2023 tax return	☐	1099 G for unemployment received
	All Clients	☐	W2G for gambling winnings
☐	W2s for all taxpayers	☐	Records of gambling losses
☐	1099 INT for interest paid	☐	Records of Rental Income and Expenses
☐	1099 DIV for all dividends paid	☐	Records of Business Income and Expense
☐	Consolidated Brokerage Statements	☐	Records of Farm Income and Expense
☐	Virtual Currency Statements	☐	Records of Alimony Paid or Received
☐	All forms K1	☐	Records of Teachers out-of-pocket expenses
☐	All 1099 NEC, 1099 MISC, and 1099Ks	☐	Records of Retirement Acct Contributions
☐	Records of any other income	☐	1098Ts and Other Educational Expenses
☐	Amounts of State/Local Taxes paid in 2024	☐	1095A for Obamacare Premiums
☐	Student Loan Interest paid	☐	Mortgage Interest 1098s
☐	Records of Daycare Expenses	☐	Records of all estimated payments
☐	Real Estate Settlement Stmnts (new or refi)	☐	Records of all 529 plan contributions
☐	Records of Missouri Credits	☐	Direct Deposit Information

How to Use This Form

Highlight all items that apply to you. Use the margins to write in the number of items expected. For instance, if you and your spouse held 3 jobs between you, then next to the W2 line write 3. Once all forms of that type are received, check the box. When all of the highlighted boxes are checked, you're ready for your tax appointment.

Use the reverse side to tally your itemizable expenses, even if you can't itemize. There are certain state deductions where they may matter.

Help Us Help You

We want to ensure you pay the least tax—receive the largest refund possible. Here are a few tips to keep in mind to prepare for your tax interview.

Make a list of any questions ahead of time so you don't forget to ask.

Please don't highlight your tax documents—highlighter does not scan well and often blackens the amount highlighted.

If there's something you think we should know, tell us. We aren't mind readers and we might forget to ask, but we do want to assist you.