



**MacFarlane and Associates, P.C.**  
**Certified Public Accountants**  
**1040 INDIVIDUAL TAX RETURN CHECKLIST**

Please indicate by a check mark which items apply to you.

**PERSONAL INFORMATION**

- Identity Protection PIN, if one has been issued to you, your spouse, or dependent by the IRS.
- Did you live or work in another state? Provide detail.
- 1095-A: Health Insurance from Healthcare.gov exchange
- List of estimated tax payments including dates and amounts paid

**Information about Digital Assets (ie cryptocurrency, NFTs etc.):**

- "At any time during 2024, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)?"

**Information about sale of a residence:**

- Did you purchase or sell your primary residence this year?
- If yes, provide details of dates it was your residence and purchase and sale price of house
- Did you receive a 1099-S?

**INCOME**

- W-2: Earning from your job
- 1099-INT: Interest Income
- 1099-DIV: Dividend Income
- 1099-R: Distributions from Pensions and other Retirement Plans
- RRB-1099: Railroad Benefits Income
- IRA Conversion or Rollover information
- SSA-1099: Social Security Income
- 1099-G: Government Payments (including unemployment benefits)
- W-2 G: Gambling winnings (also include Win/Loss statement)
- 1099-C: Cancellation of debt
- 1099-MISC: Miscellaneous Income
- 1099-NEC: Non-Employee Compensation
- 1099-B: Proceeds from Broker transactions
- Stock Option Information
- K-1: Partnerships, Trusts, S Corporations

**EXPENSES AND TAX DEDUCTIONS**

- Medical Expenses including health or long term care insurance not included on a W-2\*
  - Real Estate Taxes Paid
  - 1098: Mortgage Interest statement
  - Charitable Contributions and other Donations:
    - Cash
    - Non Cash, ie Goodwill.( Include date donated and thrift shop value)
    - Vehicle - Specific information required
- \* (only expenses above 7.5% of adjusted gross income are deductible)

**The above expenses will only be used if they are greater than your standard deduction**

**ADJUSTMENTS TO INCOME**

- 8889 - Health Savings Account deduction (other than through employer)
- K-12 Educator Expenses
- Self Employed Health Insurance
- 5498 IRA Contributions
- 1098-E: Student Loan Information

**CREDIT INFORMATION**

- Child Care Expenses for each Dependent and name and EIN of provider
- Receipts for energy-saving home improvements
- Electric Vehicle Information
- 1098-T: Education Payments from University or School

Additional Information that would be helpful in completing your return

---

---

---