

# 2024 INFORMATION NEEDED TO PREPARE YOUR INCOME TAX RETURN

PLEASE BRING ALL DOCUMENTS: **W-2'S, 1099's, K-1, Rent Paid**

## OTHER INCOME

- Dividends\_\_\_\_\_
- Savings-interest\_\_\_\_\_
- Social security\_\_\_\_\_
- Retirement(1099-R)\_\_\_\_\_
- Unemployment\_\_\_\_\_
- Sale of stocks\_\_\_\_\_
- Rental income\_\_\_\_\_
- Gambling winnings\_\_\_\_\_
- Self employment\_\_\_\_\_

## DEDUCTIONS & EXPENSES

- Teacher\_\_\_\_\_
- IRA deposits\_\_\_\_\_
- Day care: Who ,SS#, address, phone
- Self employed health ins\_\_\_\_\_
- Student loan Interest\_\_\_\_\_
- Tuition & books (FORM 1098-T REQUIRED)

## MEDICAL BILLS PAID BY YOU

- Prescriptions\_\_\_\_\_
- Insurance\_\_\_\_\_
- Chiropractor\_\_\_\_\_
- Dentist\_\_\_\_\_
- Doctor-clinic\_\_\_\_\_
- Hospital\_\_\_\_\_
- Glasses-contacts\_\_\_\_\_
- Mileage (Must be written)\_\_\_\_\_
- Nursing home ins (list individually)  
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## CONTRIBUTIONS

- Cash \_\_\_\_\_
- Non-Cash \_\_\_\_\_

## ESTIMATED TAXES

- 1<sup>st</sup> Quarter \_\_\_\_\_
- 2<sup>nd</sup> Quarter \_\_\_\_\_
- 3<sup>rd</sup> Quarter \_\_\_\_\_
- 4<sup>th</sup> Quarter \_\_\_\_\_

## DEDUCTIBLE TAXES PAID

- House & mobile home\_\_\_\_\_
- Cabin & land\_\_\_\_\_
- Personal property\_\_\_\_\_
- Automobile tabs\_\_\_\_\_

## INTEREST PAID

- Home mortgage\_\_\_\_\_
- 2nd mortgage\_\_\_\_\_
- Home equity loan\_\_\_\_\_
- Land contract (paid to, soc sec # and address)\_\_\_\_\_
- Closing papers (2024 home purchased or refinanced)\_\_\_\_\_

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### **Rawlings Tax Services**

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