PS It’s Tax Time

805B Main Avenue MAILING ADDRESS: PO BOX 430

Crivitz, WI 54114

920-434-5211

2024 Drop off information

Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Spouse \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Phone \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Driver’s license** number, **issue date and expiration** date for both of you.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you move? **New address** please! \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you have any **children in 2024**? Need name, date of birth and ss # \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Bank Information if you **changed banks**: Routing number \_\_\_\_\_\_\_\_\_\_\_\_\_\_Acct #\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you have **unemployment?** Yes/ No If yes print your 1099G from the website. (IS NOT IN US MAIL)

Did you have **Obamacare** insurance (Marketplace/Common ground? If yes need **1095A-additional fee**

If you have a **HSA** (Health savings account) need the **distribution amount for 2022.** Either get that online at the bank that has the account, or they may have mailed a form. The contribution is on your W2, but I need to reconcile the distribution on the taxes.

**Cost for health insurance** if not directly from employer. **Mostly this will be retired people**. The cost of your Medicare is on the SSA form, but I **need** additional paid for Part B, dental and vision. This is a deduction on the Wisconsin return. Total paid out of pocket, not on SSA 1099 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you **contribute to a ROTH IRA or TRADITIONAL IRA** need the $\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Did you **sell a house**? Need new address and closing document for both.

Did you **take money** out of any IRA/investments/stocks? Yes- Need 1099 for each.

Any home **energy improvements**: new windows/doors/air conditioning/furnace? If yes need the amount spent and assure that it is energy star efficient, THIS CREDIT AVAILABLE EVEN IF YOU HAVE USED IT BEFORE!

Children in **daycare**? Provider’s name, address, tax ID and the amount paid for 2024.

Children in **college**? Need 1098T and expenses that were paid by you or the student if you are claiming them. If they are under 24 and still supported by you it is usually better for you to claim them. We may want to discuss that before filing.

Primary residence **property tax** bill, indicating amount paid in 2024. I can look that up for you if needed.

**Rent paid** for 2024 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Heat** included **Y or N**

**Charitable** are most likely not deductible on the federal return but sometimes can be used on state taxes. I need the amount of monetary donations and non-monetary amount.

**Student loan interest** amount paid in 2024. \_\_\_\_\_\_\_\_

Please include all income sources: W2, Social Security SSA1099, 1099INT, 1099R, 1099Misc, Gambling winnings(W2G), cancellation of debt(1099C), alimony and all other incomes.