**TAX CHECKLIST 2024 – NEW CLIENT**

**Ashley Rabie, CPA Tax Filings & Notary**

☐Date of births for all filers

Please provide a copy of prior year tax return (including State). This is required so that I can e file your return.

Do you want your tax return e filed or paper filed?

If you get a refund, do you want it direct deposited? If so, please provide routing and account number and whether it is a checking or savings account

If you owe, do you want the payment directly taken out of your bank account? If so, please provide routing and account number, whether it is a checking or savings account, and also the payment date that you want it taken out? If you want it paid on the due date, state “due date” below.

Did you have any crypto currency? If so, provide all sale statements.

If you have distributions from an HSA, were all distributions used to pay qualified medical expenses? Please provide a 1099-SA.

Did you have any charitable donations?

Delivery format? (PW protected email or paper copy for $15 charge plus shipping if I have to mail)

Did you receive any federal or state notices received throughout the year? These would have been mailed to you. Please provide a copy if any were received.

**IF YOU HAVE CHILDREN:**

Date of births and social security numbers for all children and relationship (son, daughter)

Childcare records (tax ID number, amount paid, name and address of provider)