

This is not an all-inclusive list of reportable income or deductions and is not to be construed as tax advice.
It is a guide to help you gather the information we need to prepare your tax returns. Please consult
[IRS Publication 17 for more information.](#) For 2024 tax year

If we prepared your return for 2022 and you would like a tax organizer specific to you, please contact us.
We will be happy to upload one to our Secure Portal.

BCD Income Tax & Accounting LLC

www.bcdtax.com

205 West Dixon Boulevard, Shelby, NC 28152 704-481-0223

TAX RETURN PREPARATION CHECKLIST

WHAT TO BRING:

W-2 forms (all copies) _____
1099-INT forms _____
1099-DIV forms _____
1099-R forms _____
Other 1099 forms _____
State income tax refunds _____
Unemployment compensation _____
Social Security Benefits _____
Capital gains & losses _____
[Rental income](#) _____
[Business income](#) _____
[Farm income](#) _____
Other income _____
Barter income _____
Prizes, awards, etc. _____
Gambling winnings _____
Hobby income _____
1095A (for Marketplace
insurance coverage) _____
Bitcoin, virtual currency transactions _____

Sale of assets used in a
trade or business _____
including vehicle _____
Federal estimated tax payments _____
State estimated tax payments _____

Foreign Bank Account/property information _____
All foreign investments/assets held _____
Gifts to or from foreign persons/entities _____

Exemptions

List name, social security no., date of birth,
relationship, & no. of months lived in home
Bring birth certificates and Social Security cards.

CHILD CARE EXPENSES (Provider's name, address, ID #, and amount paid. Bring receipt.

K1s from partnerships/Scorps _____

Health Coverage Information

New Clients: Copies of past 3 years' tax returns

ITEMIZED DEDUCTIONS

(for expenses paid in tax year)

(All deductions must meet IRS rules and regulations for deductibility.)

MEDICAL

Doctor, dentists, etc. _____
Hospitals, clinics _____
Lab. exams, tests _____
Medical treatments _____
Diabetic Supplies _____
Prescription drugs _____
Health & dental ins.(not sec. 125) _____
Medical mileage _____
Other _____
Less reimb by insurance () _____

Long-term care contracts _____
Eyeglasses _____
Contact lens _____
Saline & contact lens solution _____
Insulin _____
Wheelchairs, walkers, canes _____
Hearing Aids, batteries _____
Braces _____
Less reimbursements by
flex plans, HSAs, MSAs, other, etc. () _____

Note: Your medical expense deduction is limited to the amount that is more than 7.5%
of your adjusted gross income.

TAXES

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State Income _____

Real estate _____

CASUALTY & THEFT LOSSES

[Bring details. \(Special rules & limits apply.\)](#)

[Be sure to bring records of any damages/economic losses due to Hurricane Helene.](#)

GIFTS TO CHARITY

(Cash, checks, etc.)

Church

United Way _____

Other 501 (c)3 organizations _____

(Please list) _____

501(c)4 Volunteer Fire Departments _____

INTEREST

(Reported on Form 1098)

Mortgage interest _____

(Loan proceeds, or a portion of the proceeds, must have been used to buy, build or improve your home.)

(May need details,closing statements, even if loan not originated in tax year.)

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(Loan proceeds, or a portion of the proceeds, must have been used to buy, build or improve your home.)

(May need details,closing statements, even if loan not originated in tax year.)

Points (bring details) _____

(may need details, closing statements, even if loan not originated in tax year)

Mortgage Insurance Premiums _____

(Note retroactive provisions for 2018.)

(Non Cash)

Clothing, furn., etc. _____

Goodwill _____

Salvation Army _____

Samaritan's Purse Shoebox gifts _____

Other (list) _____

Appreciated property _____

Volunteer work (out of pocket expenses & mileage) _____

(Not reported on Form 1098)

Home mortgage _____

(List name, address & identifying no. of person or institution you paid.)

(Loan proceeds, or a portion of the proceeds, must have been used to buy, build or improve your home.)

(May need details,closing statements, even if loan not originated in tax year.)

Points (bring details) _____

Other Information

College Tuition, Fees, Books, etc.

(Bring 1098T, account statements, receipts for you, your spouse, and your dependents)

Interest on School Loans _____

529 Plan contributions _____

IRA Contributions (Traditional, ROTH, SEP) _____

Educator Expenses _____

Home Energy Improvements - _____

including installation of EV Chargers

Electric Vehicle Purchase _____

We recommend you keep receipts, cancelled checks, proof of payments, tax documents, income statements and any other supporting documentation used in preparing each year's tax returns for at least 7(seven) years [from the date you filed the return. These records may be required by the STATE and/or the Internal Revenue Service in the event your tax return is audited. Records related to capital assets and business property must be kept for longer periods.](#) You may also need to keep records for longer periods for other reasons. Capital assets include real property, investment property, collectibles, and personal tangible property, such as vehicles.