***BUTLER ACCOUNTING & TAXES INC.***

***2024 CHECKLIST FOR INCOME TAXES & DEDUCTIONS***

W2'S

1099-INT INTEREST EARNED ON SAVINGS, CD'S, MONEY MARKETS

1099-DIV DIVIDENDS EARNED

1099-B STOCK SALES SOLD IN 2024/ COST BASIS ON STOCKS SOLD

1099- MISC (IF ANY) -SELF EMPLOYMENT/ OUTSIDE CONTRACTOR

1099-C CANCELLATION OF DEBT/ FORECLOSURES/ CREDIT CARD CANCELLED DEBT

1099-R RETIREMENT DISTRIBUTIONS (IRA'S, PENSION, SOCIAL SECURITY)

1099-G UNEMPLOYMENT AND STATE TAX REFUND RECEIVED IN 2024

W2-G GAMBLING WINNINGS / LOTTERY /PRIZES/AWARDS/ROYALTIES

RENTAL INCOME AND DEDUCTIONS (INVESTMENT PROPERTY)

1099-R IRA OR ROTH, 401K DISTRIBUTIONS, RETIREMENT DISTRIBUTIONS

SELF EMPLOYED SEP RETIREMENT CONTRIBUTIONS MADE

1098-E STUDENT LOAN INTEREST PAID IN 2024

NEW VEHICLE PURCHASE, EV AUTOTS, OR BOATS, RVS, BIG TICKET ITEMS

SALES TAX ON HOME BUILDING MATERIALS (ENERGY SAVINGS RELATED)

APPLIANCES PURCHASED/ WINDOWS / FURNACE/AC/SOLAR

MORTGAGE INTEREST PAID (ALSO PMI INSURANCE ON THE LOAN)

REAL ESTATE TAXES PAID / PERSONAL PROPERTY TAX

CLOSING OR SETTLEMENT STATEMENTS FOR OLD/NEW HOMES

MORTGAGE INSURANCE PREMIUMS ON CLOSING STATEMENT/MONTHLY

CASH & MISC DONATIONS (CLOTHING, GOODS TO GOODWILL)

CHURCH DONATIONS AND OTHER MISC CHARITIES/ SILENT AUCTIONS

FUND-RAISERS, GIRL/BOY SCOUTS, MARKET DAY, SCHOOL FUN FAIR, BOOK FAIR

VOLUNTEER WORK EXPENSES PLUS COACHING OR MENTORING

ANY INVOLVEMENT WITH HURRICANE RELIEF OR TORNADOES, FLOODS, FIRES

DAY CARE OR ELDERLY CARE EXPENSES / ADULT DAY CARE

MEDICAL & DENTAL EXPENSES, COUNSELING, STOP SMOKING, RX, ORTHO, BACK DR

EDUCATION FOR KIDS OR SELF, SPOUSE/ ELEMENTARY TO COLLEGE

529 COLLEGE PLANS CONTRIBUTIONS AND OR DISTRIBUTIONS WITH ACCOUNT NUMBERS

ANY INVOLVEMENT WITH BITCOIN, OR VIRTUAL CURRENCY NEEDS TO BE REPORTED

VENMO, CASH APP, ZELLE PAYMENTS FOR BUSINESS NEEDS TO BE DISCLOSED