



**Stephen G. Brilliant, M.S., CPA**  
**421 Courtyard Drive, Hillsborough, NJ 08844**  
**Telephone: 908-725-1000 Facsimile 908-725-4950 Website: brilliant.cpa**

### **2024 1040 Organizer Information Checklist**

This is a list of the most common items we'll need to finish your returns. We'll contact you if we need anything else.

- Completed Taxpayer Questionnaire (MANDATORY)**
- Completed 2024 Client Detailed Questionnaire (MANDATORY)**
- All tax return packets, mailing labels and correspondence sent to you by the various taxing agencies
- IRS pin letter, if applicable
- All W-2's
- All 1099 forms received confirming income from interest, dividends, retirement, social security, disability, unemployment, gambling winnings, cancellation of debt, credit and debit card transactions, etc.
- All 1095 forms related to health care transactions.
- Form 5498 & Form 1099-HSA for Health Saving Accounts
- All income tax information for children if you want us to prepare their required returns
- Year-end statement of mortgage interest (Form 1098), escrow activity and balance on mortgage or home equity loans and real estate taxes paid
- Total of charitable contributions, and details for any non-cash contributions over \$500. All non-cash contributions must provide receipts.
- Copies of all LLC, Partnership or S-Corporation K-1's (send separately later if everything else is ready, and let us know it's coming)
- If bought, sold, or refinanced real estate, then the 2-page HUD closing statement for each transaction
- If you sold stock or virtual currency, we need the sales price and basis information if not provided by the broker or on Form 1099
- If you are claiming vehicle mileage as a deduction from business, farm or rental properties, please provide: total miles, commuting miles, and business miles driven
- If you are self-employed and are deducting actual vehicle expenses, please provide the date of purchase (or lease), purchase price (or leased fair value), and all vehicle expenses such as lease payments, gas, car washes, licenses, insurance, tire, repairs, etc.



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- \_\_\_ Copies of any federal, state, or local tax correspondence received during the year if not already supplied
- \_\_\_ The dates and amounts paid for **all estimated tax payments** for 2024 and the amount of all refunds or rebates
- \_\_\_ All legal documents regarding formation, sale or purchase of a business during the year
- \_\_\_ All legal documents for divorce decrees
- \_\_\_ Copy of birth certificate and social security card for new dependent(s)
- \_\_\_ Copy of social security card of name change due to marriage, divorce or other
- \_\_\_ Voided check (not deposit ticket) for account where refunds should be direct deposited or payment made (optional)
- \_\_\_ All gambling income and loss records
- \_\_\_ **New Clients:** copies of two prior year federal, state, and local returns and depreciation schedules if applicable

**Thank you for the opportunity to provide you with awesome service.**