



Liu Tax Group Inc

Small Firm. Big Difference.

46164 Westlake Dr, P.O.BOX 650083 Sterling VA 20165

Phone: 240-899-4990 Fax: 1-888-317-2608

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2024 US. Resident Individual Tax Preparation Checklist

Use this list to help you get organized to file your taxes return. Note: If you're getting free help filing your taxes in person, make sure you bring a photo identification for all adults in your household. **All information can upload at www.liutaxgroup.com.**

Step 1: Provide Basic Information

- **All family member name (Name will same as they appear on the Social Security Card (SSN) or Individual Taxpayer Identification Number letter (ITIN) for you and all dependents (including children and elderly relatives for whom you provide care)**
- **Date of birth and relationship** (son, daughter, mother, etc.)
- **How many months in US in 2024 if you are due status.**
- **Current address** (it may be different from the address on your employment records)
- **Contact phone number and Email address**
- **Occupation**
- **Copy of driver's license for both family member.**
- **Copy of your personal check for refund.**
- **Please provide 1099G if you receive any unemployment benefit.**

Step 2: Provide Tax Report Documents

- 2023 Tax return copy for Federal and state if you are new client.
- **W-2, 1099MISC, Tips and all other income documents.**
- **1099 INT (Interest statement)**
- **Foreign income and tax** documents.
- All **Foreign bank account or security account**, include owner's name, bank name, address, phone, account number, beginning & end year balance, maximum amount.
- **1098s** showing payments you've made (school loans, property tax).
- **Childcare expenses:** name, address, Tax ID or Social Security Number of the childcare provider
- **Business expenses and assets:** We provide a worksheet if you need it.
- **Partnership or Corporation income and expenses:** State business register letter, Article of organization, partnership agreement, EIN letter.
- **Investment property.** All income and expenses. If you purchase it in 2024, please provide a settlement (HUD) document. If you purchase prior, please provide detail depreciation carry over to 2024. We provide a worksheet if you need it.
- **Home office.** Please provide square feet of home office and total square feet of home. The actual expenses.
- **College:** loans and/or scholarships received, and bills for technical/community college or university (Forms 1098-T/1098-E)
- **Educator expenses** for teaching grades K-12 (school supplies and materials used in the classroom)
- **Charitable donations:** list of contributions and amounts, receipts for contributions over \$250
- **Vehicles:** vehicle sales tax, personal property tax statement for each car you own, total miles driven for the year and/or total miles driven for business
- **Homeowners:** mortgage interest statement (Form 1098), real estate taxes paid, Statement of Property Tax Payable in 2024
- **Retirement/IRA:** amount contributed to an IRA and total value as of December 2024
- **Health care insurance policy from marketplace or other organization. Please provide form 1095a!**



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- If you would like **electric directly deposit** refund or tax payment, please provide a void check to me.
- Any estimate tax prepaid copy.

Step3: Gather detail information from IRA (Optional)

Are you expecting any other tax documents besides what has already been provided to us? To ensure you provided all your 2024 tax documents, please use the link below to obtain your 2024 Wage and Income Transcript/Tax records. You can download and print your transcript immediately or request the transcript be mailed to your address on record. Please provide us with a copy once obtained/received.

<http://www.irs.gov/Individuals/Get-Transcript>

You may also use the link to get a record of your past tax returns, also referred to as tax return transcripts.

Step 4: Upload file or email to us.

You can email your document to us or drop to a security account at:

<https://www.liutaxgroup.com/sharefile-client-portal/>

Step 5: After tax return, keep copies of your forms and tax statements

For your protection, keep any forms used to prepare your taxes and a copy of your return for seven years. This information will make it easier to file your taxes next year.

Step 6. Payment

You can make a direct payment from the invoice we send to you or Zelle at:
LiuTaxgroup@gmail.com.

Please contact us any time if you have any questions. We will be on your side.

Hope you and your family success in 2024!

Bonnie Liu, EA

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