

# O'NEIL & STEINER, PLLC

## CHECKLIST FOR TAX RETURN PACKETS

- Engagement Letter: Download and complete the engagement letter for your marital status (red buttons) on our tax documents page.
  - **\*RARE\*** If any of the standard election statements do not reflect your circumstances, please complete the Non-Standard Elections form (blue button) instead of page 3.
- Information Changes: Alert your preparer with notes regarding changes to your marital status, dependents/household members, bank account for direct deposit of refunds, mailing address, telephone, email address, etc.
- Complete Tax Packet: Review your income records and consider activity for the prior year to determine if you have the following included in your packet:
  - **Income Forms**: Do you have all the forms W-2, 1099-Int, 1099-Div, 1099-B, 1099-R, 1099-G, 1099-Misc, SSA-1099, Schedules K-1, etc. you expected for the year? Have you reviewed and recorded income not reported to you on tax forms (gambling, cryptocurrency transactions, rental income, self-employed income, alimony, etc.)?
  - **Deductions**: Have you reviewed and recorded total amounts paid for deductible items (medical expenses, real estate taxes, sales tax on the purchase of vehicles/boats, vehicle license portion of auto registration, cash charitable donations, non-cash charitable donations, etc.)? Have you reviewed the returning client organizer and prior year returns to identify potential missing items specific to your circumstances (teacher deductions, IRA and/or HSA contributions, alimony paid, etc.)?
  - **Organizers**: Did you use and/or review the organizers available for self-employed income, rental property, home office expenses, college expenses, vehicle mileage recap, and cancellation of debt income?
- Tax Credit Contributions: Have you decided how to direct your AZ tax dollars through use of the AZ Tax Credit programs for 2024? Please see our AZ Tax Credit Info on the dedicated tab of our website or review the AZ Tax Credit Info Sheet. If you plan to make AZ Tax Credit contributions between now and the April 15<sup>th</sup> deadline, please be sure to list the recipient organization and dollar amounts with your return information. Mark the last column to indicate made in 2025.
- Retirement/Health Savings Contributions: If you plan to contribute to your Individual Retirement Account (IRA), Health Savings Account (HSA), or similar accounts prior to the April 15<sup>th</sup> deadline please communicate the amount and type of account. (Traditional, Roth, HSA, etc.)