TAX PREPARATION CHECKLIST

INCOME

- W2s (Income earned from work)
- Social Security (SSA-1099)
- Pensions, IRAs, Retirement (1099 R)
- Interest Income (1099 Int)
- Dividends (1099 Div)
- Gains & Losses (1099 B)
- 1099 Combined (i.e. Fidelity will combine the above Interest, Dividends, & Gains/Losses into one form)

- **Fidelity 2024 Tax Form Delivery Calendar—Estimated mailing dates**
  - Key online activation dates for high-volume tax forms*
  - Retirement Tax Forms (5498, 1099-R): January 17th
  - 1099 1st Mailing: January 25th
  - 1099 2nd Mailing, Info Only, and Preliminary Tax Reporting Statement: February 8th
  - 1099 3rd Mailing: February 22th
  - 1099 4th Mailing: March 7th

  **Dates are subject to change due to unforeseen circumstances. For clients set to receive their form(s) by mail, the form will generally mail within 5 business days of the online activation date.*

OTHER POSSIBLE INCOME

- Rental Income
- Self-Employment Income
- Farm Income
- Gambling Income (W2G)

OTHER POSSIBLE ITEMS

- Student Loan Interest (1098 E)
- Tuition (1098 T)
- Traditional IRA/Roth IRA Contributions
- Roth Conversions (is not noted on forms so need to make sure told was a conversion)
- Qualified Charitable Contributions (QCD) No form so client has to make sure to inform CPA
- 5498 IRA Statement—if you are making IRA contributions or conversions

ITEMIZED DEDUCTION ITEMS

- Medical & Dental (very few qualify, often they must be a significant amount)
- Property Taxes (home, vehicles, boats, etc.)
- Mortgage Interest (Form 1098)
- Charitable Cash contributions (if QCD, need to be noted separately)
- Non-cash contributions (Physical items donated to charitable organizations)