

**INDEPENDENT TAX SERVICE INC.
TAX APPOINTMENT CHECKLIST**

JANUARY 2025

A copy of your 2024/2025 property tax bill – we must have it to complete your VT return	
A copy of your 2023 federal and state returns (if we did not prepare them)	

BANK ACCOUNT INFORMATION – If you want your refund direct deposited

Name of Bank		Bank Routing #	
Account #		Checking or Savings Account?	

VIRTUAL CURRENCY

Did you acquire or sell any virtual currency in 2024?	Y/N
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FOREIGN ASSETS

Do you have any foreign assets? We'll need the amount and description.	
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SALES TAX

Amount of out of state or internet purchases subject to sales tax (not previously paid)	
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INCOME

W-2s		1099-SSA social security benefits	
1099s for interest & dividends		Unemployment 1099	
1099s for pension and annuities		All shareholder and partner K-1s	

EXPENSES

All Property taxes paid in 2024		Medical expenses	
Mortgage interest – Form 1098		Electric car/charging station details and costs	
Cash charitable contributions		Student Loan Interest Paid (Form 1098-E)	
Noncash charitable contributions – be sure to bring receipts with amounts		Home energy improvements – we'll need description and costs.	

2024 IRA/SEP/SIMPLE CONTRIBUTIONS

Amount	IRA/Roth IRA/SEP/SIMPLE?	Date contributed
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HSA ACCOUNTS

2024 HSA contributions		2024 HSA disbursements (Bring 1099-SA)	
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ESTIMATED TAXES PAID

TO IRS		TO VERMONT	
Enter date paid	Amount	Enter date paid	Amount
Jan 2024 (for 2023)		Jan 2024 (for 2023)	
1 st		1 st	
2 nd		2 nd	
3 rd		3 rd	
4 th (Jan 2025 for 2024)		4 th (Jan 2025 for 2024)	

SELF-EMPLOYMENT INCOME & EXPENSES

Business income	Business expenses in categories	
Copies of all business 1099s received	Health insurance cost for 2024	
Health insurance Form 1095-A	Are you an LLC or registered with the VT Sec'y of State?	

BUSINESS USE OF CAR – INFORMATION NEEDED FOR EACH VEHICLE

Make/model of car		Odometer reading 12/31/24	
2024 total and business mileage		2024 loan interest paid on vehicle	

BUSINESS USE OF HOME

Business square footage		Total square footage of home	
Home expenses in categories		If 1 st year settlement stmt/purchase price/land value	

CHILD CARE CREDIT

Provider names		SSN/EIN		Addresses		Amounts paid	
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RENTAL PROPERTY/AIRBNB

Total rental income		# days rented	
If AIRBNB, 1099 and earnings stmt		Area of home rented	
Rental expenses by category		If 1 st year Purchase price/settlement stmt/land value	

SALE OF STOCK

Form 1099-B		Year-end broker statements	
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EDUCATION CREDITS/DEDUCTIONS

Form 1098-T	
529 withdrawals? Bring Forms 1099-Q	
VHEIP 529 contributions – bring statements	
Cost of out of pocket supplies and books	
Student account summary from the school showing all charges and payments during calendar year 2024 (spring 2024 and fall 2024 semesters)	

PRESIDENTIAL ELECTION CAMPAIGN CONTRIBUTION - \$3

Yes/No	Contributions will not reduce your refund
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VT VOLUNTARY CONTRIBUTIONS – contributions will reduce your refund

Organization	Yes/No	Amount	Organization	Yes/No	Amount
1. Children's Trust Fund			3. Green Up		
2. VT Veterans			4. Nongame Wildlife		

VERMONT PROPERTY TAX/RENTER'S REBATE

If you own, bring your 2024/2025 property tax bill.			
2024 Form 1040 and W-2s for all household family members		Amount of gifts received over \$6,500 in 2024	
Amount of child support received or paid (include documentation)		Amount of nontaxable income received for all household family members in 2024	
List of everyone who lived in your home at anytime during 2024			