This checklist is to help you find the documents we need to prepare your return. It is not required to be filled out and returned to us. You may not have every document on the list.

Circle Tax & Accounting

6324 N Chatham Ave #206, Kansas City, MO 64151
Phone: 816-753-1700 Fax: 816-753-4703
Email: **questions@circletax.com**
www.circletax.com https://circletax.sharefile.com

Name(s)________________________________________ ☐ Check here if changed since last year

Best way to reach you? Phone Email Mail

Phone Number to contact you: ______________________ Secondary Number: ______________________

Email Address: ________________________________________

☐ Check here if you have any dependents not included on prior year return (and please fill out a new info sheet)

**We are trying to make sure all your information is updated. Please look in your folder for your info sheet and review all the information. If you need to update the information, please download the info sheet from our website and update all information.**

**Income Documents**

☐ W-2 Forms from all employers
☐ 1099-Misc or NEC Forms (contract work over $600).
☐ Investment income information 1099-INT, 1099-DIV, 1099-B
☐ Retirement Distributions (1099-R)
☐ Income from local and state tax refunds from the prior year (only if you previously itemized) (1099-G)
☐ Business income (Schedule C income/Expenses or K-1)
☐ Unemployment income (1099-G)--check the state website if you do not receive it via mail
☐ Rental property income (Schedule E or F Income/Expenses)
☐ Social Security or Railroad Retirement benefits (1099-SSA or 1099-RRB)
☐ Health savings account distribution (1099-SA)
☐ Miscellaneous income (including: alimony received, jury duty, lottery and gambling winnings (W-2G), Form 1099-MISC for prizes and awards, and Form 1099-MSA for distributions from medical savings accounts)

**Adjustment Documents**

☐ IRA contributions (might have 5498)/529 Contributions
☐ Student loan interest-Form 1098-E
☐ Health/Medical Savings Account (HSA/MSA) contributions (Contributions through employer are on W-2)
☐ Self-employed health insurance amount
☐ Alimony Paid (including Name and SSN for person paid)

**Deduction Documents**—Standard deductions are $14,600 Single, $21,900 Head of Household, and $29,200 Married filing Jointly. If you do not have that much in deductions then we may not itemize on the federal return, however if you live in Kansas we may be able to itemize so please provide these documents.

☐ Mortgage Interest (Form 1098)
☐ Real Estate Taxes (usually included on mortgage statement)
☐ Property taxes on Vehicles
☐ Charitable contributions
☐ Medical expenses not paid for with HSA or FSA (over 7.5% of your income)

**Other Info for Credits**

☐ Education costs (Form 1098-T) plus costs of required books/supplies
☐ Childcare costs (Name, Address, and SSN/EIN for care provider plus amount paid)

**Health Insurance**

☐ **Marketplace Form (1095-A)—if you had insurance through the marketplace for any part of 2024 (with or without a subsidy) we need the 1095-A. They most likely mailed it, but it is also available on healthcare.gov website if you have an account. If we do not include this your return will get rejected.**
☐ Other insurance (1095-B or 1095-C)—Not required for filing.

If you have a refund would you like it to be Direct Deposited? ☐ Yes ☐ No
If you have a balance due would you like it auto debited? ☐ Yes ☐ No
(Please include bank information on the Info sheet)