

**MILLER & COMPANY CPA's, PLLC**  
**INCOME TAX CHECKLIST-2024**  
**(Please complete and bring to your appointment)**

**GENERAL INFO: (New Clients Only)**

\_\_\_ Taxpayer's Birth Date \_\_\_/\_\_\_/\_\_\_  
\_\_\_ Spouse's Birth Date \_\_\_/\_\_\_/\_\_\_  
\_\_\_ Taxpayer's SS# \_\_\_-\_\_\_-\_\_\_  
\_\_\_ Spouse's SS# \_\_\_-\_\_\_-\_\_\_  
\_\_\_ Birth Dates of Dependent Children  
\_\_\_ Social Security Cards (Copies) for All  
Dependents (New clients/or dependents only)  
\_\_\_ **Health Insurance Forms (1095-A, 1095-B, 1095-C)**  
(If Applicable)  
\_\_\_ **2023 Income Taxes (new clients only)**

**INCOME:**

\_\_\_ Wage Income (Include all W-2 Forms)  
\_\_\_ Interest earned on savings, etc.  
(Include all 1099- INT Forms)  
\_\_\_ Dividend Income (Include all 1099-DIV Forms)  
\_\_\_ Social Security Benefits Received in 2024  
(Include Form SSA-1099)  
\_\_\_ State of Utah Tax Refund Received in 2024  
Amount \$ \_\_\_\_\_  
\_\_\_ Unemployment Benefits Received in 2024  
(Include Unemployment Form 1099G)  
\_\_\_ K-1's (Partnership, Sub S Corporation Income)  
\_\_\_ IRA Distributions  
(Include 1099 IRA Forms and/or Year end statements)  
\_\_\_ Pensions (Include all 1099-R Forms)  
\_\_\_ Rental, Lease Income/Expenses  
(Include 1099-MISC Forms)  
\_\_\_ Disability Income (Include forms received)  
\_\_\_ Business Income/Expenses  
\_\_\_ Farm Income/Expenses  
\_\_\_ Alimony Received in 2024 (If divorce before 2019)  
\_\_\_ Prizes, Awards, Gambling & Lottery Winnings  
\_\_\_ Other Income (please specify)  
\_\_\_ **HSA Distributions (Include Form 1099-SA)**

**ADJUSTMENTS TO INCOME:**

\_\_\_ Penalty for early savings withdrawal  
\_\_\_ IRA contributions made (or to be made) for 2024  
\_\_\_ Interest on Qualified Student Loans (Form 1098-E)  
\_\_\_ **HSA Contributions (Include Form 5498-SA)**

**Itemized Deductions**

**TAXES PAID:**

\_\_\_ Real Estate Taxes Paid in 2024  
\_\_\_ Sales tax paid on vehicles, large items in 2024

**INTEREST PAID:**

\_\_\_ Mortgage / HELOC Interest Paid in 2024

**MEDICAL EXPENSES:**

\_\_\_ Medical/Hosp/Dental Insurance Premiums Paid  
\*\*Do Not Include Pre Tax amounts deducted from wages  
\_\_\_ Prescription medications/drugs  
\_\_\_ Doctor Bills Paid in 2024  
\_\_\_ Dentist Bills Paid in 2024  
\_\_\_ Hospital Bills Paid in 2024  
\_\_\_ Medical Items Purchased  
(Glasses, Dentures, etc.)  
\_\_\_ Lodging for Medical Treatment  
\_\_\_ Mileage for Medical Treatment

**CONTRIBUTIONS: (\*Over \$250 require a receipt)**

\_\_\_ Church Cash Contributions  
\_\_\_ Other 501(c)3 Qualified Cash Contributions  
\_\_\_ Non-cash Qualified Contributions  
\_\_\_ Vehicle Mileage on Charitable Work

**MISCELLANEOUS DEDUCTIONS:**

\_\_\_ Gambling Losses (Limited to Winnings)

**TAX CREDITS:**

\_\_\_ Child Care Expense Paid in 2024  
\*The taxpayer must fill out from W-10 for each  
child care provider in order to take the child care  
credit in 2024. (If you need a W-10 form, we  
can provide one for you.)  
\_\_\_ Adoption Expenses  
\_\_\_ **Premium Tax Credit (Include Form 1095-A)**  
**Tuition & Related Expenses (Form 1098-T)**

**Appointment**

Date: \_\_\_\_\_

Time: \_\_\_\_\_

**56 North Main Street  
Richfield, Utah 84701  
(435) 896-4301**