<u>2024</u>

Spouse:	Taxpayer:	DOB:	Soc Se	c #:	Occupation		
Current Address: Filing Status Married: Head of Household: Single: Email Address: County of Residency Jan 1 ⁴ , 2024: Tele: Home: Work: Cell: Children and Other Dependents (if not sure if you can claim do not hesitate to ask) Name: Relationship DOB Mo In Home Soc Sec #. Dependent Income How many vrs in college Interest Income Earned Dividend Income Other Income From Whom Amounts From Whom Amounts From Whom Amounts To assist us in claiming all deductions and credits due you and bring the supporting data. Interest Municipal)	Spouse:	DOB:	Soc Sec	#:	Occupation		
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Hartley Tax & Accounting, LLC 6066 East State Blvd Fort Wayne, IN 46815 Telephone 260.749.0444 Secure Client Portal link online@ hartleytaxaccounting.securefilepro.com Fax 260.749.4002 Tax checklists also online @ hartleytaxaccounting.com

Please see other side of Page

<u>2024</u>

Itemized	Deductions and Credits		
Medical and Dental Expenses (must exceed 7.5% of AGI) Amt	Contributions – Gift to Charity Amount		
Medical Insurance Premium	Church (must have acknowledgement)		
Long Term Care Insurance Premium	College – (list University)		
Indiana Partnership Long Term Care Insurance	Special License Plate (Note if IN College).		
College and School Insurance Premium	Foreign Exchange StudentX \$50 mo		
Medicare Insurance Premium	Other Charitable Contributions		
Medicare Drug Coverage Insurance	Miles driven for charity miles		
Contact Lens/Vision Insurance	In Kind (household goods given to charity (if \$500 or more		
Prescription Drugs / Insulin	must have acknowledgement from Charity and detailed list		
Eyeglasses and Repairs	of items in order to take)		
Hearing Aids and batteries	,		
Hospitals			
Nursing Home Expenses	FOR ALL MILEAGE DEDUCTIONS record ODOMETER READINGS ANE PURPOSE –		
Lab and X-Ray Fees	Business mileage rate is \$.67 Per Mile		
Doctors / Dentists			
Parking Fees and Lodging Expenses for Medical			
Miles Driven for Medical Purposesmiles			
Taxes	Other Potential Items:		
Real Estate – Home	Bad Debt or Worthless Stock		
Condo or Lake Property Taxes	Gambling Losses if Reporting Wins		
Personal Property and Boat Excise	Teaching Supplies (K-12)		
Vehicle Excise Tax Veh 1 Veh 2 Veh 3 Veh 4			
Excise Tax	Home Residential Energy Credit Windows, Doors, HVAC, Hot water heaters and Boilers. Solar, Geothermal and Wind.		
Estimated State and Federal taxes you Paid by Check Due Date 04/24 06/24 09/24 01/25 Federal	BRING RECEIPTS OF PURCHASE		
State	Websites for making Estimated Payments online:		
*Would you like 2025 vouchers and envelopes?	Federal - https://www.irs.gov/payments		
Yes No	Indiana- https://intime.dor.in.gov/eServices/_/#1		
	Other states available upon request		
Interest Paid to Others			
Home Mortgage – (if paid to an individual List Name,			
Address, and Social Security Number)			
	If claiming a child that did not live with you, you must have a signed Form 8332.		
Mortgage Insurance Premium			
Home Equity / 2 nd Mortgage	American Opportunity and Lifetime Learning		
Time Share / Lake Property	Credit Tuition Paid or Financed		
Investment Interest	Renters Deduction-Landlord Name, Address, Rent		
Vehicle Interest / <u>Schedule C</u> Filers Only	(\$3000 Maximum allowed in Indiana)		
Credit Card Interest / <u>Schedule C</u> Filers Only	······································		
Student Loan Interest (bring statements)			
Points Paid On Home Refinance or Purchase			
Credits and Other Deductibles			
Day Care Business – List on Separate Sheet Please			
Daycare Information (for Children through age 12)			
(This Includes Sitter, Preschool and Maid Services)			
Name Address Social Security Number or	EIN (Required) <u>Amount Paid</u>		

Standard Deduction: Single \$14,600 - HOH \$21,900 - Joint \$29,200 - Additional if over 65/or Blind \$3,100(M), \$1,950(S) Please see other side