

**GRANITE MOUNTAIN TAX SERVICE
NEW CLIENT CHECKLIST TY2024**

You can provide original documents which will be scanned and returned to you unless otherwise indicated or you can upload documents on to Drake Portal.

Identification Documents

- Drivers' Licenses for Taxpayer and Spouse (copy only)
- Social Security Cards for Taxpayer, Spouse, and Dependents (copy only)
- Bank Information including Name, Routing Number and Account Number
(If electing direct deposit)
- Identity Protection PIN (if assigned by IRS)

Prior Year Tax Documents

- Most Recent Tax Return

Income Documents

- Wage Income (W-2)
- Interest and Dividends (1099-INT and 1099-DIV)
- State Refund and Unemployment Payments (1099-G)
- Retirement Payments (1099-R)
- Social Security and Railroad Retirement Payments (1099-SSA and -RRB)
- Stock and Bond Sales (1099 Comprehensive)
- Partnership/Estate/Trust Income (K-1)
- Sale of Assets (Home or other property) - Include both purchase and sale documents
- Gambling Winnings (W-2G) - Include gambling loss documentation.
- Payment Card and Third Party Transactions (1099-K)

Other Income

- Self Employment Income - Please complete Schedule C organizer
- Rental Income - Please complete Schedule E organizer

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Deductions/Credits

- If itemizing deductions, please use Schedule A organizer
- Charity Donations whether itemizing or not
(use organizer for non-cash donations)
- State Tax Credit Donations
- Student Loan Interest
- Health Saving Account Contributions and Distributions
- Solar Installation or Electric/Hybrid Car Purchases
- Installation of New Windows, Doors, Heat Pumps
- Educator Classroom Expenses
- Tuition and Fees for College/University
(please use Education Credits organizer)
- Child/Dependent Care Expenses
(Need provider information including name, address and SSN or EIN)
- Retirement Account Contributions

Other Items

- Estimated Tax Payments
- Health Care Information (1095-A and/or 1095-C)
- Health Savings Account Contributions/Distributions (1099-SA/5489-SA)

Organizers for Schedules A, C, E, Car/Truck Expense, Office In Home, Non-Cash Donation, and Education Credits can be found at www.gmtaxes.net under the Resources tab.