Warren Office (586) 751-6060 Fax (586) 751-1533 www.hkglcpa.com

Heemer Klein & Company, PLLC

Accounting and Tax Services

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Richmond Office (586) 727-5145 Fax (586) 727-5062 www.hkglcpa.com

2024 TAX DATA SHEET

		TAXPAY	YER			TAX	PAYER (SPOUSE)	
NAME								
SOC. SEC.#								
DRIVERS LIC. #								
LIC ISSUE DATE								
LIC. EXP. DATE								
OCCUPATION								
DATE OF BIRTH								
HOME ADDRESS					CITY, ST, ZI	P		
TELEPHONE #	HOME () -			CELL ()	-	
	CELL () -						
EMAIL					SCHOOL I	DISTRICT -	-	
ADDRESS(ES)								
NAME (FUI	L)	Soc. Sec	C.#	RELATIONSHI	P BIRTH	I DATE	MONTHS AT HOME	CHILD CARE EXPENSES

HOME EXPE	NSES

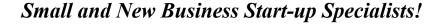
CHILDREN AND / OR DEPENDENTS — USE BACK IF NEEDED BANK ACCOUNT INFORMATION FOR DIRECT DEPOSIT OF REFUND

Providing this information will significantly decrease the time required to receive your refund!						
Bank Name:	Account Type	Checking	Savings	Joint?		
Routing Number	Account Number					

BRING THIS TAX INFORMATION WITH YOU

- All W2's from your employer
- All Interest and Dividend Income Statements (1099 INT, 1099 DIV, 1099B Statements) from banks, credit unions, and brokerage firms (including all VIRTUAL currency transactions—such as Bitcoin etc).
- Social Security statements (SSA-1099); Pension, Annuity, and/or IRA distributions (1099R)
- Real Estate tax bills for 2024 (paid or not) and for previous years paid in 2024.
- Any other income statements for miscellaneous income, unemployment, alimony, prizes, state & local tax refunds, lottery winnings (W2G), etc.
- Tuition information for each college student (1098-T) and a list of all related college expenses
- If this is your first year with Heemer Klein, we need a copy of your 2023 and 2022 tax returns to best prepare your 2024 return.
- If you were in the health care marketplace and received a government subsidy, you should have received a form 1095-A. We must have this form to reconcile your premiums.







2024 ESTIMATED TAX PAYMENTS PAID (TAXPAYER MUST COMPLETE, IF APPLICABLE)

	FEDERAL ESTIMATES		STATE	ESTIMATES	CITY ESTIMATES	
	AMOUNT	CHECK# & DATE	AMOUNT	CHECK # & DATE	AMOUNT	CHECK # & DATE
4/15/24						
6/17/24						
9/16/24						
1/15/25						

Tax Updates

• Please see our website www.hkglcpa.com



for the latest tax updates.

Schedule A - Itemized Deduction Worksheet:

The following information will be required if you plan on itemizing your deductions. The standard deductions are as follows: married filing jointly (\$29,200), married filing separately and single filers (\$14,600), and head of household (\$21,900). (If over 65 or blind, add \$1,950 per taxpayer.)

Please be advised that paid bills and cancelled checks claimed as deductions must be kept for a period of at least three years to comply with tax regulations and audit procedures. DO NOT CLAIM as deductions any bills that have not actually been paid within the calendar year of 2024.

MEDICAL	CONTRIBUTIONS	TAXES	
Dentist -	CASH OR CHECKS - ALL CONTRIBUTIONS MUST HAVE BOTH STATEMENTS AND CANCELED CHECKS TO QUALIFY	This category is limited WITH all State and Local Income Taxes.	
Doctors -	Church -	Home Property Taxes -	
	College / University -	2 nd Home –	
Hospital -	Other -	Land -	
Ins. Reimbursement -		License Tabs -	
Lodging Expenses -			
Long Term Care Premiums -	NON CASH - IF OVER \$500 MUST HAVE DETAILED LIST AND VALUE OF DONATION WITH NAMES AND ADDRESSES	Interest Expenses	
Medial Insurance – other	Salvation Army/Goodwill -	Home Mortgage –	
than Medicare -			
Miles Driven	Other -	*Home Equity -	
Prescription Drugs	Other -	**LAND CONTRACTS -	
Other (glasses etc) -	Charitable Mileage -		

^{*}For Home Equity Loan – Deductible only if used to purchase or improve home.

*Alimony – paid (or received) Date Divorce agreement executed **Child Care expenses (12yrs/under)Gambling losses IRA Contributions made before April 15, 2025 Did you contribute to a Health Savings Acct (HSA)? (Do NOT include employer's contributions.) *Must have name and SS# of recipient **Must have name/address/ID# of caregiver





^{**}For Land Contracts – We need the name, address, and social security number of the owner.