

# Malar DePape & Associates LLC

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Mt. Clemens MI 48043  
586-493-1360

109 S Main  
Capac, MI 48014  
810-395-2320

2920 Pine Grove  
Port Huron, MI 48060  
810-479-5142

Cell for All Offices 586-531-3414 (for text only)

## 2024 Income Tax Preparation Drop Off Sheet

<input type="checkbox"/>	Did we prepare your 2023 income taxes?		
<input type="checkbox"/>	Check box if contact info has changed		
<input type="checkbox"/>	Name (Including Spouse) _____		
<input type="checkbox"/>	Address (if different from last year) _____		
<input type="checkbox"/>	Copy of Drivers Licenses _____		
<input type="checkbox"/>	Cell Phone _____	Y/N	May we text you at this number _____
<input type="checkbox"/>	Alternate Phone if any _____		Cell Work Home _____
<input type="checkbox"/>	Email _____		

<input type="checkbox"/>	Dependents _____
<input type="checkbox"/>	Added or Deleting _____
<input type="checkbox"/>	Did Filing Status Change? Circle -Single, Married, Head of Household, Married Separate
<input type="checkbox"/>	Do you have any Foreign Bank Accounts? if yes was there \$10,000 at any given point during the year
<input type="checkbox"/>	Do you have any Virtual Currency?

**This Info Is Needed in order to file your 2024 Taxes if had Business Miles or Marketplace Ins**

<input type="checkbox"/>	Business Mileage 67 Cents
<input type="checkbox"/>	Health Insurance From Market Place <span style="float: right;"><b>If yes we need 1095-A</b></span>

**Income**

<input type="checkbox"/>	Wages <b>W-2s</b>
<input type="checkbox"/>	Interest <b>1099-INT</b>
<input type="checkbox"/>	Dividends <b>1099-DIV</b>
<input type="checkbox"/>	Sell any Stocks <b>1099-B</b>
<input type="checkbox"/>	Pension, IRA, Profit Sharing Etc <b>1099-R</b>
<input type="checkbox"/>	Social Security <b>1099-SSA</b>
<input type="checkbox"/>	Unemployment <b>1099-G</b>
<input type="checkbox"/>	Gambling Winnings <b>W2G</b>
<input type="checkbox"/>	Self Employed Income ( <b>1099-NEC</b> ) & Expense Detail
<input type="checkbox"/>	Rental Property Income ( <b>1099-Misc</b> ) & Expense Detail
<input type="checkbox"/>	<b>(1099K) if received</b>

**Deductions if over standard amount  
(single \$14,600 married \$29,200)**

<input type="checkbox"/>	Medical Expense over 7.5% of income before \$1 counts
<input type="checkbox"/>	Real Estate Taxes
<input type="checkbox"/>	Car Tags
<input type="checkbox"/>	Mortgage Interest (1098)
<input type="checkbox"/>	Noncash donations over \$250 need detail and receipts
<input type="checkbox"/>	Cash Donations over \$250 need detail and receipts
<input type="checkbox"/>	Gambling Losses if had winnings

Continued on back

**Adjustments**

- Health Savings Contribution **5498-SA**
- Health Savings Distribution **1099-SA**
- Day Care for kids under 13 (**Stmt from provider**)
- Educator expense Taxpayer and/or spouse
- Alimony paid or received if divorce was before 1.1.2019
- Student Loan Interest **1098-E**
- Tuition-college (**1098T**)
- IRA Contributions (**5498**)

**Did you make any Estimated payments**

Fed Amount & Date	State Amount & Date	City amount and Date

Any energy efficient home improvements? Windows, furnace, storm doors, water heaters, etc?  
Roofs are not a credit.

**Household Income Under \$69,700 for Michigan Homestead Credit**

If own house  
Property taxable value \_\_\_\_\_  
Summer and Winter 2024 taxes assessed even if not paid \_\_\_\_\_

If renting  
Monthly rent \_\_\_\_\_  
Months rented \_\_\_\_\_  
Landlord name and address \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Refund Method**

- Paper Check
- Direct Deposit       Confirm # even if Same as last year

- New Account  
  - Checking      or      Savings
- Bank Name \_\_\_\_\_
- Bank Routing Number \_\_\_\_\_
- Bank account Number \_\_\_\_\_

**Any Questions you have or any thing you think we should be aware of when preparing 2024 taxes**