ARNE REINERT CPA, LLC
P.O. BOX 230
LINDSBORG, KS 67456
(785) 227-3000

This list is designed to assist you in gathering the information required for preparation of your individual tax return. Please provide us with all the following documents **that apply to you** for 2024.

- Form(s) W-2 (wages)
- Form(s) 1099 (interest, dividends, brokerage statements, asset sales, rents, social security, retirement distributions, nonemployee compensation, unemployment, government payments, patronage dividends, crop insurance proceeds, HSA distributions, etc.)
- Form(s) 1099-K
- Form(s) 1098 (mortgage interest)
- Form(s) 1095-A, 1095-B, and 1095-C (health insurance)
- Form(s) 1098-T (tuition)
- Form(s) 1098-E (student loan interest)
- Schedule(s) K-1 (pass-through entity reports)
- Settlement/Closing statements (real estate sales and/or purchases)
- Loan histories/statements on all business loans
- Purchase invoices and finance documents on all business and farm purchases
- Receipts for charitable contributions of more than $250 and a total of all charitable donations for the year
- Any tax letters or notices received from the IRS or other taxing authorities not previously forwarded to us
- Gallons of gasoline purchased for non-highway use for farm or business purposes

In addition to the above documents, please furnish the following information:

- Changes to your address, marital status, dependents, telephone number(s), or email addresses. **Provide updates here:**

- Changes to the bank account used for refunds or payments on the prior year return. **Provide updates here:**

- Did you acquire, use, dispose of or hold any virtual currency/cryptocurrency (such as bitcoin) in 2024? Yes No

- Would you like to have any refund(s) direct deposited? Yes No

- Would you like to have any payment(s) direct drafted? Yes No

- Would you like a paper or electronic copy of your completed return? Access to electronic return will be provided through our portal. Paper Electronic

Please return this with the tax information you send to us. Thank you for your assistance.

Sincerely,

ARNE REINERT CPA, LLC