

2024 EOY TAX CHECKLIST



IMPORTANT DATES & DEADLINES

- ☐ **December 31:** Tax year ends, all payments are final
- ☐ **January 31:** W-2 Day & last day to get a good accountant
- ☐ **April 15:** Tax Day – The last day you have to file

ALL ABOUT YOU & WORK

- ☐ Decide whether to self-file or use a pro
- ☐ W-2s from all employers
- ☐ 1099s from jobs (e.g. freelance), investments, banks, government
- ☐ Maximized your 401K
- ☐ Maximized your IRA or Roth
- ☐ Kept receipts for quarterly tax payments
- ☐ Reviewed W-4 withholding for future year or set up quarterly schedule
- ☐ Prepared spreadsheet showing highest value of non-US assets and income generated from them
- ☐ Receipts for Electric Car credits
- ☐ Donation receipts if itemizing
- ☐ Out of pocket medical expenses if itemizing
- ☐ Finalized most recent non-US tax return

BUSINESS CHECKS

- ☐ Made any purchases possible
- ☐ Reconciled accounts
- ☐ Quarterly tax payments
- ☐ Special new Jan 1 Business Filing (BOI)

THOSE WITH FAMILY

- ☐ Did your family grow? Shrink?
- ☐ Did you get married or divorced?
- ☐ Did you have dependent care expenses?
- ☐ Did you contribute to a 529?
- ☐ Do you have student loan tuition?

INVESTMENTS

- ☐ Local standard investments
- ☐ Investing apps & online tools
- ☐ Foreign investments
- ☐ Non-US structures and possible restructuring

HOME OWNER SPECIFICS

- ☐ 1098 form, property tax bills?
- ☐ Solar panel installation or clean energy?

QUESTIONS?

- ☐ Join our free webinar on January 21, 2025 at 8pmET USA / 5pmPT USA / 12pm EST (Jan 22, 2025) in Australia. [Register here.](#)

