

PREPPING FOR TAX SEASON



Elysium Tax

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South Jordan, Utah 84095

(801) 568-1500

taxUT@myelysium.com

myelysium.com/tax-services

WHAT TO BRING TO YOUR APPOINTMENT



Use this list to help you collect Forms, Receipts, Documents etc. for sources of Income. Upload your documents through the Guest Exchange on ***ElysiumTax.securefilepro.com*** (or scan the QR code) or bring them into your appointment.

Identification & Payment

- Routing Transmit Number (RTN) and Bank Account Number (BAN) for direct deposit of refund or debit if you owe
- Driver's License for You and Your Spouse

All New Clients

- Social Security Numbers and Birthdates for You and Your Spouse
- A copy of your previous Year Tax Return
- The names, birthdates and social security numbers for all Dependents

Income Items

General Taxable Income

- W-2 Form(s)
 - Wages, Salaries, and Tips
 - You will need a W-2 form for **EVERY JOB** you had during the year

Retirement Income

- Retirement Income 1099-R
 - Pensions or funds withdrawn from a retirement plan/account
- SSA - 1099
 - Social Security Income or Railroad Retirement Income

Other Reported Income

- 1099s
 - 1099-INT & 1099-OID: Interest Income Statements
 - 1099-DIV: Dividend Income Statements
 - 1099-B: Sales of Stock, Land, etc. for Capital Gains
 - 1099-S: Sales of Real Estate
 - 1099-G: State Tax Refunds or Unemployment Compensation Received
 - 1099-NEC or 1099-MISC: Miscellaneous Income

Business Income / Rental Properties / Farming

If you need any business organizers, email taxUT@myelysium.com

- Self Employed Income and Expenses
- S-Corporation or Partnership Income and Expenses
- Rental Income and Expenses
- Farm Income and Expenses

Education

- Educational Expenses for You or Your Spouse (1098-T etc.)
- Dependents' Post High School Educational Expenses (1098-T etc.)

Deductions

- Mortgage Interest Statement (1098)
- Property Tax Statement
- Charitable Contribution Statements
- Medical Expenses

Tax Credits

Child Tax Credit

- The Child Tax Credit for dependents under age 17 is \$2,000 each
- The Child Tax Credit for dependents age 17 and older is \$500 each
 - If you have not claimed the dependent before, make sure to bring the full name, birthdate, and social security number for each dependent

Child Care Expenses for young dependents

- Child Care Provider
- Address
- Tax I.D. Number of Provider
- Amount(s) Paid

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ITEMIZED DEDUCTIONS QUESTIONNAIRE 2024

Remember, this is to help jog your memory and records . . . but is NOT all-inclusive
(The 2024 standard deduction amounts are as follows: Single or married filing separately: \$14,600
Married filing jointly: \$29,200 and Head of household: \$21,900. Age 65 & older add \$1,550 or \$1,950)

MEDICAL EXPENSES:

Prescription drugs \$ _____
Lab/X-Ray Fees \$ _____
Glasses/Contact Lenses \$ _____
- Contact care supplies \$ _____
Doctors & Clinics \$ _____
Dentist & Orthodontists \$ _____
Hospitals \$ _____
Physical Therapy etc. \$ _____
Health Ins. Premiums** \$ _____
Dental Ins. Premiums \$ _____
Long-Care Ins. Premiums \$ _____
Medical Lodging \$ _____
Medical Mileage # _____
Other Medical \$ _____

**** If you had Health Insurance through the Marketplace; You MUST bring from 1095A.**

TAXES PAID:

Home Real Estate Taxes \$ _____
2nd Home Real Estate Taxes \$ _____
Other Real Estate Taxes \$ _____
Boat or Recreational Vehicle \$ _____

INTEREST PAID:

Home Mortgage 1st \$ _____
2nd Home Mortgage MAYBE \$ _____

If mortgage is paid to an individual:

Name _____
SS# _____
Street Address _____
City, State & Zip code _____
Refinance of Mortgage/Points* \$ _____
Student Loan Interest (1098-E) \$ _____

If refinanced in 2024, Please bring closing papers of new loan **AND the loan paid off.*

*** CONTRIBUTIONS / DONATIONS

Church \$ _____
Payroll Deduction \$ _____
Am Heart Asso. \$ _____
Cancer \$ _____
Primary Pennies \$ _____
Boy Scouts \$ _____
Others: \$ _____

*** CLOTHING and OTHER NON-CASH

Salvation Army \$ _____
Deseret Industries \$ _____
The ARC of Utah \$ _____
Other \$ _____
Charity Mileage # _____

***** You MUST have a receipt for any donation made regardless of size - cash or non-cash.**

Tuition & Fees (1098-T) \$ _____

I look forward to meeting with you and helping to minimize your income tax. If I can be of more service to you, call, text, or e-mail me.

Elysium Tax

1802 W South Jordan Parkway, Suite 130
South Jordan, UT 84095

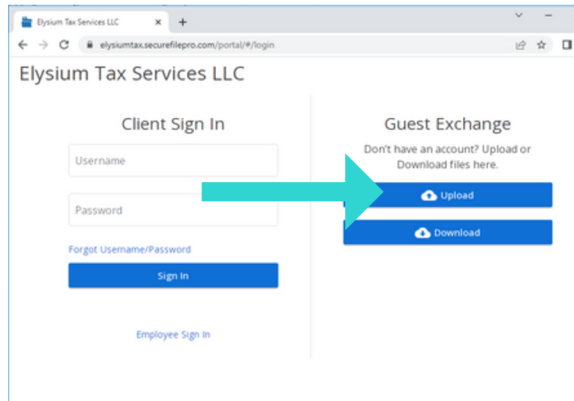
OFFICE 801-568-1500
EMAIL taxUT@myelysium.com

upload forms securely at
ElysiumTax.SecureFilePro.com

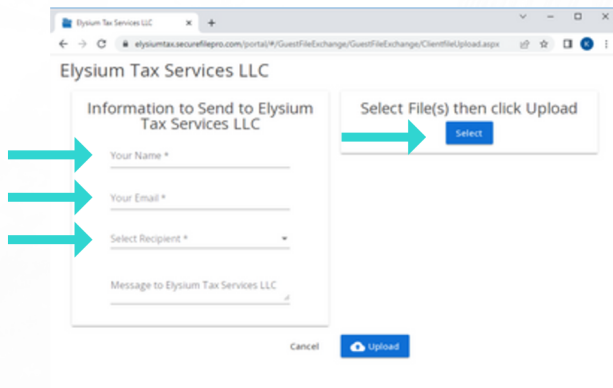
Uploading Your Documents



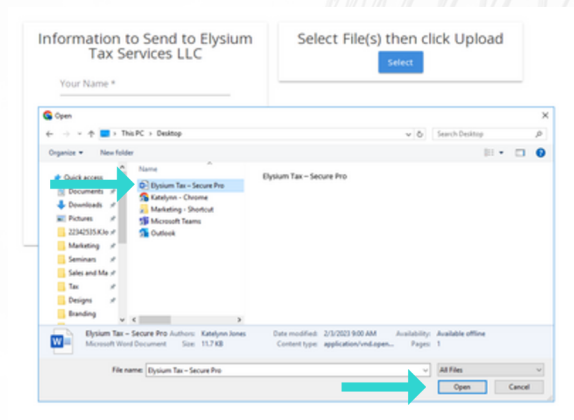
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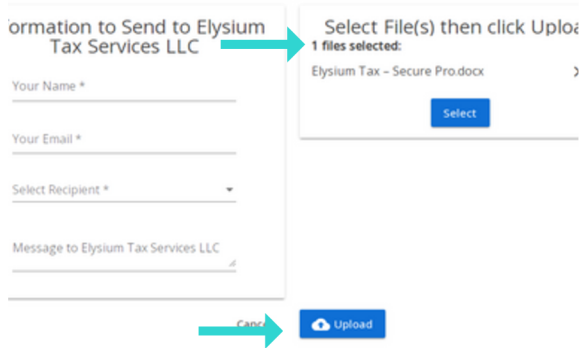
- Step 1 -
 - Scan QR code and go to ElysiumTax.securefilepro.com
 - select "Upload" under Guest Exchange



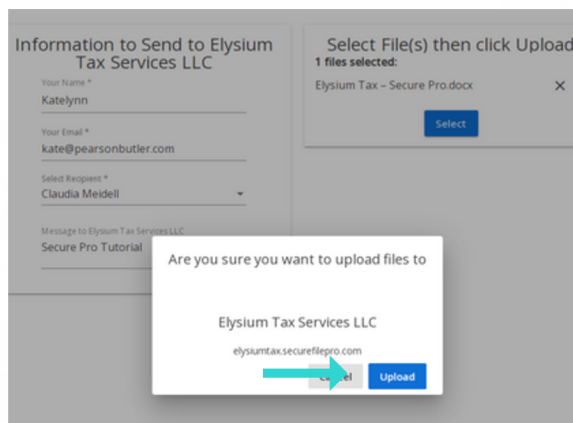
- Step 2 -
 - fill out Full Name, Email Address, Select Claudia as the Recipient
 - click on "Select"



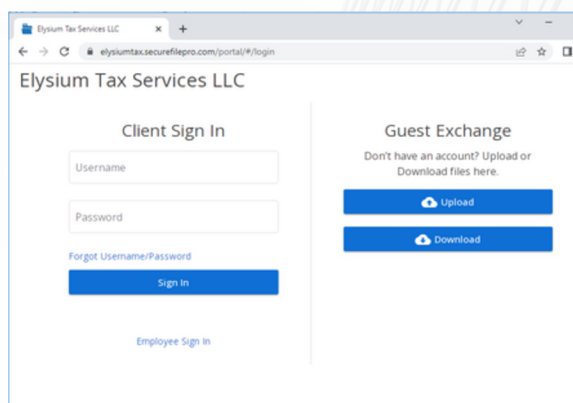
- Step 3 -
 - in the window that pops up after clicking on "Select" find the tax documents you would like to upload.
 - select "Open"



- Step 4 -
 - After you have selected all of your tax documents to upload they will appear in the box on the left.
 - Once they are all listed, click on "Upload"



- Step 5 -
 - You will be asked to verify that you want to upload these files for Elysium Tax - select "Upload" to verify



- Step 6 -
 - After selecting "Upload" you will be returned to the login screen.
 - Your upload has been successful and Claudia will review your documents.



- To see a video tutorial of the uploading process scan the QR code or visit <https://bit.ly/ElysiumTaxDocs>