

# CHECKLIST

Please submit the following 2023 documents or bring with you to your scheduled appointment:

**\*Please Note: All documents may not apply to you**

- Driver's License or State ID (Front and Back)for Taxpayer, Spouse
- Social security cards for all household members and birth certificates for ALL dependents
- W-2 Forms from all employers
- 1099-Int Interest Income Statements
- 1099-Div Dividend Statements
- 1099-R Retirement Statements
- 1099-C Cancellation of Debt Statements
- 1099-B Brokerage Statements. Make sure cost basis is included
- 1095-A documenting health care coverage and advanced premium credit if purchased through the marketplace
- SSA-1099 Social Security benefits statement
- 1099-G Unemployment benefits statement
- 1099-G State or local income tax refund statement
- 1099-G from gambling winnings (include losses)
- Schedule K-1 Forms, federal and state, for interests in a Partnership, S Corporation, Estate or Trusts
- Farm income and expenses for 2023 including from sales of livestock, crops, etc.
- Alimony received or paid during 2023 including name and SSN of recipient or payer
- Income received from each Rental/Investment property and summary of expenses paid during 2023 for each property
- Settlement statement for all properties purchased or sold during 2023
- 1098 Mortgage Interest statement and paid school/property/town/village tax bills if not included on mortgage statement
- 1099-Misc / 1099-NEC forms and other income summary for income received but not reported on a 1099
- Expense summary related to above income
- Sales tax paid in 2023 on any car, boat, small country or large item purchased
- Federal and State Income tax estimated payments (detailed by date and amount paid)
- List of monetary charitable contributions. Letter is needed from any organization you donated more than \$250
- Non-cash contribution receipts (summary of what/where/when donated, estimated thrift shop value & approx original cost)
- Receipts for 2023 energy efficient home improvements (windows, doors, insulation, heating system, water heater, central air conditioner, solar system, geothermal heat pumps, fuel cell property, wind turbines)
- Day care, summer camp, preschool total paid for dependents under age 13 (provider name, address, EIN/SSN, amount paid)
- Health/dental insurance and all related out of pocket medical expenses, including modifications to your home to aid a physically disabled person (Only medical expenses over 7.5% of income are deductible and only if you itemize)
- Canceled check or bank letter for direct deposit account
- Bill of sale for any electric vehicle purchased
- Additional tax documents you received or other information you feel is pertinent to your return preparation

## **New Clients Only**

Previous two years Tax Returns (federal and state)

- Any loss carryovers from previous years
- Depreciation schedules from previous years (If you have a farm or business)

***We appreciate referrals, reviews, and you!***

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