

Before we begin to prepare your income tax return, go through the following checklist. Highlight the areas that apply to you, and make sure you have that information available for us. Better yet, attach the list to a folder of your tax documents, and check items off as you add them to the folder.

NEW CLIENTS ONLY - IMPORTANT

- Social Security numbers and dates of birth for you, your spouse, and your dependents
- Copy of last year's tax return - Federal, State, and Local returns
- Voided check or other document showing bank account number and routing number
- Copy of a valid driver's license or state ID for you and your spouse (if applicable)

INCOME INFORMATION

- W-2 forms for wages received by you, spouse, and dependents, and W-2G forms for gambling winnings
- 1099-DIV, 1099-INT, and 1099-B forms for interest and dividends received, and sales of stocks or mutual funds
- Documentation related to sales of cryptocurrency of any kind
- 1099-R forms for pension and/or IRA distributions
- 1099-SSA statements for social security benefits received
- 1099-G forms for unemployment income, or state or local tax refunds
- 1099-MISC or 1099-NEC forms received as a result of self-employment or subcontracting
- Business or farming income and expenses, including information on purchases and sales of equipment
- K-1 forms from S-Corporations, partnerships, estates, and/or trusts
- Rental property income and expenses, including closing statements from purchases or sales
- Miscellaneous income from 1099-C, alimony (pre-2019 agreements), jury duty, etc.

ADJUSTMENTS TO INCOME

- Form 1098-E for student loan interest paid (or statements for student loans)
- Form 1098-T received for tuition paid, and any other higher education expenses
- Out-of-pocket expenses for K-12th grade educators, including PPE expenses
- Amounts of contributions to IRAs (including Roth IRAs), SEP, and SIMPLE plans, including rollovers
- Form 1099-SA relating to HSA or MSA contributions and/or withdrawals
- Alimony paid (pre-2019 agreements)

DEDUCTIONS AND CREDITS

- Medical and dental expense records, including self-employed health insurance paid
- Real estate taxes paid, as well as State and Local taxes paid
- Amounts and dates of estimated taxes paid (Federal, State, School District, City)
- Forms 1098 for mortgage interest paid & PMI, and closing statements from sale/purchase/refi of property
- Forms 1098 for Home Equity Loans and Lines of Credit - with backup for how funds were used
- Contributions to charitable organizations (both cash and non-cash) including statements received
- Contributions to charitable organizations made directly from an IRA
- Vehicle expense, including total and business miles, or actual expenses paid (**associated with 1099-MISC only**)
- Home office expenses, including total home sq footage and office sq footage (**associated with 1099-MISC only**)
- Child care costs: provider's name, address, tax ID, and amount paid (on statement from provider if possible)
- Adoption costs: SSN of child, and records of legal, medical, and transportation costs
- Receipts for Energy Efficient home improvements, i.e. Windows, Furnace, HWT, A/C, Doors, Metal Roof, Heat Pumps, Solar Panels, etc.

OTHER MISCELLANEOUS ITEMS

- **Form 1095-A for health insurance purchased through the Healthcare.gov Marketplace**
- Documentation about any ERC credits received - businesses only
- **Any other item you think may be needed or that you have questions about**

IMPORTANT 2023 TAX LAW CHANGES THAT MAY AFFECT YOUR RETURN

- **Most tax credits have returned to their pre-pandemic levels, including the Child Tax Credit, Earned Income Tax Credit, and Dependent Care Credit**
- **Starting in 2023, if you purchased a used electric vehicle, you can get a credit of up to \$4,000 (or 30% of the purchase price).**
- **For business owners, the new \$600 reporting threshold for payment platforms such as PayPal, Ebay, CashApp, and Venmo has been pushed back another year until 2024 - the existing threshold of \$20,000 in payments with over 200 transactions is still in place for this year.**