

2023 TAX PREPARATION CHECK LIST

1. Social Security number and birth date for all **new** family members.
2. Copies of all W-2's.
3. Form 1095-A OR 1095-B OR 1095-C.
4. Copies of all 1099's received for interest, dividends, pensions, sale of stock, sale of property, **sale of virtual currency**, unemployment, social security, refunds, debt forgiveness and other income.
5. Year-end brokerage statements from investments. Documents showing purchase information for any property, stock, or mutual fund sold.
6. Copies of K-1's from partnerships, S Corps, estates and trusts.
7. **Documents showing contributions to a Traditional or Roth IRA. Make sure to mention if you put into either of these incase you qualify for a Savers Credit.**
8. Any Tuition paid to a college/university in 2023. (1098T) Also, information regarding grants/scholarships received and actual costs paid including books and fees. **Bring a history of account from school showing payments made.**
9. Day care information including cost, day care provider name, address, social security number or federal ID number.
10. A list of deductions: medical expenses, investment expenses, property taxes paid, cost of licensing your 1984 or newer vehicles, mortgage interest statement (1098), charitable contributions (which you have record of contribution.)
11. If you are a new client, please bring your 2021 and 2022 taxes.
12. Copies of 1099-HSA if you belong to a health savings account and how much of that amount was withdrawn for medical expenses.
13. 2023 Property Tax Statements or other document containing your TAXABLE VALUE.
14. If a home was bought or sold during the year, bring all closing statements. If you sold or bought a home on a land contract you need: name, address and social security number of the person you are paying or receiving payment from and a copy of the payment schedule.
15. **Record of estimated payments made, and dates paid (cancelled checks.)**
16. If renting, name and address of landlord/s and amount of rent paid.
17. Bank account and routing # for direct deposit.
18. All people working in food service must bring in tip books.
19. **All transactions involving Virtual Currency.**
20. **Any Residential Energy Improvements to see if they qualify for the new credits.**
21. List of any questions or concerns you have and all other information pertaining to 2023 or planning for 2024.

OWNERS OF RENTAL PROPERTY

Keep total separate for each rental property owned for the following expenses:

1. Income
2. Advertising
3. Supplies, repairs, and maintenance costs
4. Mortgage interest
5. Property taxes paid
6. Management fees
7. Mileage incurred
8. Utilities paid by you
9. Insurance premiums

MORE DOCUMENTATION MAY BE REQUIRED THIS YEAR AS THE IRS IS PUTTING MORE REQUIRMENTS ON LICENSED TAX PREPARERS.

Schedule Your appointment today on our website!!

You must have supporting receipts to substantiate your expenses and deductions.

A \$25 charge for additional copies of your return will be charged if needed.