*Name:*____*Phone Number:* ______________________
Email Address: ____

This Checklist is being provided to ensure that we have all the documents/paperwork needed to prepare your tax return.

Please fill out completely & include in the package you provide us. If you have an appointment, fill it out **BEFORE** your appointment

In order to reduce omitting documents and/or errors we can longer accept incomplete/multiple packages.

Taxpayer Name:______________________________ SS#____________________Occupation________________

In 2023, were you ☐ Full-Time Student ☐ Legally Blind ☐ Totally/Permanently Disabled

Spouse Name:______________________________ SS#____________________Occupation________________

In 2023, were you ☐ Full-Time Student ☐ Legally Blind ☐ Totally/Permanently Disabled

☐ Copy of Driver's License for Taxpayer and Spouse

☐ Can anyone claim you or your spouse as a dependent? ____YES ____NO ____UNSURE

☐ List the names of **EVERYONE** who lived with you & **ANYONE** you supported that did not live with you

Name	Soc Sec #	Date of Birth	Relationship	Student	Disabled

☐ Identity Protection PIN, if one has been issued to you, your spouse, or your dependent by the IRS

☐ Routing and account #'s to receive your refund by direct deposit or pay your balance due if you choose

REFUND - Direct Deposit? _____YES _____NO (have my refund sent by mail)

TAXES DUE - Deducted from bank account? _____YES _____NO, I will mail a check

ESTIMATED TAXES - Deduct from bank account provided? _____YES _____NO

☐ Bank Information: ☐ Checking ☐ Savings Name of Bank:_____________________________

Bank Routing Number#: __________________ Bank Account #:_____________________________

☐ Income of dependents and of other adults in your home

☐ Form 8332/Custodial parent is releasing their right to claim a child to you (if applicable)

☐ Marital status changed? If yes, please explain:____

☐ Moved in 2023? If yes, date moved and new address: ____

____

☐ Record of estimated federal tax payments (Form 1040–ES) and state tax payments (Form 760-ES)

Employed

☐ Forms W-2

Unemployed

☐ Unemployment (1099-G)

Self-Employed - Worksheet (we will provide) filled out and included with your paperwork

☐ Forms 1099-MISC, 1099-NEC, 1099-K, Sch K-1 and income records to verify amounts *not* reported

☐ Records of all expenses — P& L Statement or Worksheet (Worksheet provided if needed)

☐ Business-Use asset information (cost, date placed in service, etc.) for depreciation

☐ Office in home information, if applicable

Rental Income - Worksheet (we will provide) filled out and included with your paperwork

☐ Records of income and expenses (Worksheet provided if needed)

☐ Rental asset information (cost, date placed in service, etc.) for depreciation

Other Income & Losses

☐ Received Tip Income ____ NO ____ YES If yes, amount ***NOT*** included in W2/1099 $___________
☐ Retirement Income/Pension/IRA/annuity income (1099-R)
☐ Traditional IRA basis (i.e., amounts you contributed to the IRA that were already taxed)
☐ Social security/RRB income (SSA-1099, RRB-1099)
☐ Savings & Investments or Dividends Interest, dividend income (1099-INT, 1099-OID, 1099-DIV)
☐ Income from sales of stock or other property (1099-B, 1099-S)
☐ Dates of purchases & your cost basis in property you sold (if basis is not reported on 1099-B)
☐ Health Savings Account and long-term care reimbursements (1099-SA or 1099-LTC)
☐ Expenses related to your investments
☐ Transactions involving cryptocurrency (Virtual currency)
☐ Stock Incentives/Stock Options given by Employer
☐ Gambling income (W-2G or records showing income, as well as expense records)
☐ Jury duty records
☐ Hobby income and expenses
☐ Prizes and awards
☐ Trust income
☐ Royalty income 1099-MISC
☐ Any other 1099s received
☐ Record of alimony paid/received with ex-spouse's name and SSN
☐ State tax refund

Home Ownership

☐ Forms 1098 or other mortgage interest statements
☐ Real estate and personal property tax records
☐ Receipts for energy-saving home improvements (e.g., solar panels, solar water heater)
☐ All other 1098 series forms

Charitable Donations

☐ Cash amounts donated to houses of worship, schools, other charitable organizations
☐ Records of non-cash charitable donations
☐ Amounts of miles driven for charitable or medical purposes

Types of Deductions

☐ Medical Expenses - Amounts paid for healthcare, insurance, and to doctors, dentists, and hospitals
☐ Health Insurance: Form 1095-A if your insurance plan is through the Marketplace (Exchange)
☐ Childcare expenses (including the provider's address & tax ID number)
☐ Expenses paid through a dependent care flexible spending account at work
☐ Amount of state and local income or sales tax paid (other than wage withholding)
☐ Invoice showing amount of vehicle sales tax paid and / or personal property tax on vehicles
☐ Received the First Time Homebuyers Credit in 2008? ____YES ____NO
☐ Do you have a "Capital Loss Carryover" on Form 1040 Schedule D? ____YES ____NO
☐ Electric Vehicle Purchased in 2003 (provide date purchased, Veh ID#, make and model)

Educational Expenses

☐ Forms 1098-T from educational institutions
☐ Forms 1099-Q for distributions from education savings plans
☐ Records of qualified educational expenses/scholarships not included on 1098-T
☐ Forms 1098-E if you paid student loan interest
☐ K-12 Educator expenses

Retirement & Other Savings

☐ Form 5498-SA showing HSA contributions
☐ Form 5498 showing IRA contributions
☐ All other 5498 series forms (5498-QA, 5498-ESA)

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