

We've compiled the following checklist to help prepare your tax return.
Please use the tax checklist below to find the documents and forms needed to get started.
* If you are a new client, please provide a copy of last year's Income Tax return.*

PERSONAL INFORMATION

- Driver's license or other valid form of ID
- Social Security number
- Your spouse's full name, DOB, and Social Security number

DEPENDENT(S) INFORMATION

- DOB and Social Security numbers
- Childcare records (including the provider's tax ID number), if applicable
- Income of dependents and other adults in your home
- Form 8332 showing that the child's custodial parent is releasing their right to claim a child to you, the noncustodial parent (if applicable)

EMPLOYED

- Forms W-2

UNEMPLOYED

- Unemployment, state tax refund (1099-G)

SELF-EMPLOYED

- Forms 1099-MISC, Schedules K-1, income records to verify amounts not reported on 1099s
- Form 1099-NEC or Form 1099-K for you and your spouse for any independent contract work or if you're paid through a third party such as PayPal
- Records of income and expenses
- Business-use asset information for depreciation (cost, date placed in service, etc.)
- Form 1040ES - Quarterly Estimated tax payments, including date and amount

RENTAL INCOME

- Records of income and expenses
- Rental asset information for depreciation (cost, date placed in service, etc.)
- Form 1040ES - Quarterly Estimated tax payments, including date and amount

RETIREMENT INCOME

- Beginning in 2023, the SECURE 2.0 Act raised the age at which you must start taking RMDs to age 73. If you reach age 72 in 2023, the required beginning date for your first RMD is April 1, 2025, for 2024. **Required minimum distributions (RMDs)** are the minimum amounts you must withdraw from your retirement accounts each year. You generally must start taking withdrawals from your traditional IRA, SEP IRA, SIMPLE IRA, and retirement plan accounts when you reach age 72 (73 if you reach age 72 after December 31, 2022)
- Form 1099-R (Pension/ IRA / Annuity)
- Traditional IRA basis (amounts you contributed to the IRA that were already taxed)
- Form 1099-SSA (Social security Income)

SAVINGS & INVESTMENTS OR DIVIDENDS

- Form 1099-INT (Interest), Form 1099-DIV (Dividends)
- Form 1099-B, Form 1099-S (Income from sales of stock or other property)
- Virtual currency and Cryptocurrency** - At any time during 2023, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (If yes, provide details)
- Dates of acquisition and records of your cost or basis in property you sold (if the basis is not reported on 1099-B)
- Form 1099-SA or Form 1099-LTC (Health Savings Account and long-term care reimbursements)
- Expenses related to your investments
- Form 1040ES - Quarterly Estimated tax payments, including date and amount

OTHER INCOME & LOSSES

- Form W-2G (Gambling income) or Gambling loss document required, if applicable
- 1099-S forms for income from the sale of a property
- Jury duty records
- Hobby Income & Expenses
- Prizes & Awards
- Trust Income
- Royalty Income
- Any other 1099s received
- Cancellation of debt (1099-C forms for cancellation of debt)
- Record of alimony paid/received with former spouse's name and SSN
<You can't deduct alimony payments made under a divorce or separation agreement executed after 2018>

HOME OWNERSHIP	
<input type="checkbox"/>	Form 1098 or other mortgage interest statements
<input type="checkbox"/>	Real estate and personal property tax records
<input type="checkbox"/>	Receipts for any qualifying energy-efficient home improvements (solar, windows, etc.)
<input type="checkbox"/>	All other 1098 series forms
CHARITABLE DONATIONS - (NEED RECEIPTS)	
<input type="checkbox"/>	Cash amounts donated to houses of worship, schools, and other charitable organizations
<input type="checkbox"/>	Records of non-cash charitable donations
MEDICAL EXPENSES	
<input type="checkbox"/>	Amounts paid for Healthcare Insurance premiums
<input type="checkbox"/>	Amounts paid to Medical doctors and Prescriptions
<input type="checkbox"/>	Amounts paid to Dentists and Prescriptions
<input type="checkbox"/>	Amounts paid to Optometrists (Vision) and Prescriptions (Eyewear)
<input type="checkbox"/>	Amounts paid for Long-term care premiums
	Only if total medical expenses exceed 7.5% of your Adjusted Gross Income
HEALTH INSURANCE	
<input type="checkbox"/>	Form 1095-A (HealthPlanFinder)
CHILDCARE EXPENSES	
<input type="checkbox"/>	Fees paid to a licensed daycare center or preschooler - Provide Name, Tax ID, and Address
<input type="checkbox"/>	Wages paid to a babysitter - Provide Name, SSN, and Address
	Don't include expenses paid through a flexible spending account at work
EDUCATIONAL EXPENSES	
<input type="checkbox"/>	Form 1098-T (Tuition and Education Fees)
<input type="checkbox"/>	Form 1098-E if you paid student loan interest
<input type="checkbox"/>	Records of any scholarships or fellowships you received
<input type="checkbox"/>	Are you or your spouse a K-12 educator? If so, receipts for classroom expenses

STATE & LOCAL TAXES OR SALES TAX

- Amount of state/local income tax paid (other than wage withholding)
 - Amount of state/local sales tax paid
 - An invoice showing the amount of sales tax paid for significant purchases (for example, vehicle purchase)
- ** The state and local tax deduction is capped at \$10,000 **

FOREIGN FINANCIAL ACCOUNT (FBAR)

- Any Foreign Income detail - Interest/ Dividend or earned Income
- Do you have a financial interest in or signature authority over a foreign financial account, including a bank account, brokerage account, mutual fund, trust, or other type of foreign financial account?
- If you answered yes, did the aggregate value of those foreign financial accounts exceed \$10,000 at any time during the calendar year?
- If you answered yes, please provide a Bank Name, Address, Account #, and highest balance during 2023 for all your foreign accounts

RETIREMENT & OTHER SAVINGS

- Records of IRA and other retirement account contributions and rollovers made during the year
- Form 5498-SA showing HSA contributions
- Form 5498 showing IRA contributions
- All other 5498 series forms (Form 5498-QA, Form 5498-ESA)

OTHER INFORMATION

- Estimated tax payments made during the year, including date and amount
- If you own a business, have you checked if you comply with the Corporate Transparency Act - Beneficial Ownership Information Reporting? This reporting requirement applies only to entities such as corporations, LLCs, and others formed by filing a document with a state secretary of state or similar official. It doesn't apply to sole proprietors. Please visit www.fincen.gov/boi for additional information about the Reporting Rule and guidance materials.

FOR DIRECT DEPOSIT OF YOUR TAX REFUND

- Please provide Bank Routing & Account number