

2023 Tax Document Short Checklist

___ Social Security numbers and birthdates for everyone included on your return (spouse, children, parents, etc)

___ Copies of Drivers licenses or other form of ID for taxpayer and spouse.

___ Last year's tax return and amount paid for preparing the tax return (only if we did not prepare your prior year tax return)

___ Amount of estimated income tax payments paid for 2022 (both Federal and State) and the dates paid

___ All forms that say W-2, 1098, 1099, or (Schedule) K-1

___ All forms 1095A and/or documentation of health care coverage if you received insurance through the exchange (Obamacare).

___ Records of other income (rental, jury duty, gambling, hobby, unemployment, alimony, state or local income tax refunds, etc.) and expenses, if applicable

___ Income and expense records for work you performed (not already shown on a W-2 or 1099). All expenditures including mileage must be properly documented.

___ Purchase date and original cost of any stocks or other property you sold during this year (forms from broker).

___ Records of any contributions you made to IRAs or other retirement plans

___ Records for mortgage interest, real estate and personal property taxes paid

___ Amounts donated to houses of worship, schools and other charitable organizations, including receipts.

___ Receipts for any non-cash charitable donations and documentation of values and listing of items.

___ Amount paid for health insurance and to doctors, dentists, hospitals, etc.

___ Records to support childcare (name, phone number, and SSN or EIN of child care provider) and higher education costs (tuition or student loan interest).