2023 TAX PREP

CHECKLIST

Name:

# ALL TAX FILERS

[ ]  W2’s and/ or 1099s

[ ]  SS#/Birth certificate for dependents (unless in our system from prior year)

[ ]  Our office forms

[ ]  **1095-A If Covered CA insurance. If no Covered CA, please provide 1095-B or 1095-C**

[ ]  Interest earned. Form 1099INT

[ ]  Dividends earned Form 1099DIV

[ ]  Stock sales form 1099B

[ ]  Crypto sales detail.

# Home Owners (long form)

[ ]  Mortgage Interest Statement

[ ]  Property tax Statement

[ ]  Car registration

[ ]  Charitable donations

[ ]  Interest and Dividend income

[ ]  Contributions

# Business owners

[ ]  Income total and/or 1099s

[ ]  Expense listing and totals

[ ]  K1 (if one is issued for your taxes)

[ ]  Mileage totals: Personal total and Business total.

[ ]  Prior year tax return if new client.

# unemployement payments

[ ]  Federal and State unemployment benefit forms

# Additional Items if applicable

[ ]  1098-T for qualifying education

[ ]  IRA/HSA forms

[ ]  Social Security payment forms

[ ]  Student loan interest

[ ]  Securities Sale Forms

[ ]  Prior year tax return if new client and long form.

***\*\*INDICATE WHAT IS INCLUDED AND SUBMIT CHECK LIST WITH FORMS\*\****