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\*\****