

Checklist For Filing Your 2023 Income Tax Return

Income:

- All W-2s
- All W-2 G (Gambling and Lottery Winnings)
- 1099-NEC Self Employment / Contractor Income (please bring detailed Profit and Loss statements as well as year end Balance Sheets)
- 1099-INT and 1099-DIV Interest and Dividend Income
- 1099-R Retirement / Pension / IRA Distributions
- 1099-SSA Social Security
- 1099-MISC Royalty (Oil, gas, minerals, and intellectual property) / Rental / Other
- 1099-G State Refunds / Unemployment
- 1099-SA (HSA distributions)
- Form K-1 Partnership, S-Corporation, Estates, Trust, and LLC Income
- Rental / Farm
- Sale of Primary or Vacation Home (Include closing statement)
- Sale of Rental Property
- Sale of Investments: Stocks, bonds, digital currency, and any other capital investments (ENTIRE STATEMENT)
- Sale of Business Assets
- Alimony
- Scholarships and Fellowships
- Hobby Income
- 1099 – A, B, C, S, K, OID, PATR

Deductions:

- Medical Expenses, Milage, Lodging, Insurance Premiums, LTC Premiums by Taxpayer (Please bring proof of payment)
- Real estate and personal property taxes paid including, ownership fees from car, truck, RV, boat, and trailer
- State and local income taxes paid
- Estimated taxes paid to Federal and States (Detail amounts and dates paid)
- Mortgage interest paid. Include second mortgages on your principal residence and mortgages on a second home including a recreational vehicle. Home equity loans and lines of credit.
- Points
- Purchase / Refi Documents (Include closing statements)

Miscellaneous:

- Contributions to IRA or SEP
- Alimony Paid
- Child and Dependent care expenses (Tax ID and address for provider)
- 1095 – A, B or C (Proof of Health Insurance)
- ANY Correspondence from IRS and State Taxing authorities
- Any other documents tax related not included in this list