

Tax Appointment Checklist for 2023 (Filing on year 2022)

General Checklist for Everyone

- Last years tax return if you are a new client
- Drivers license or valid federal ID
- SS number
- Birthdate
- Current address
- Valid phone number
- Filing status (Single, Married Filing Jointly, Married Filing Separately, Qualifying Widower, Head of Household)
- Dependents:
 - Full name of each dependent
 - Birthdate of each dependent
 - SS number of each dependent

Checklist for W-2 Employees

- Forms W-2 from your employer(s)
- Forms 1099 from banks, issuing agencies, and other payers including:
 - Unemployment compensation (1099-G)
 - Dividends (1099-DIV)
 - Distributions from a pension, annuity, or retirement plan (1099-R)
- Forms 1099-K
- Forms 1099 MISC or NEC
- Forms 1099-INT if you were paid interest
- Other income documents and records of vital currency, transactions
- Form 1095-A (Health Insurance Marketplace Statement)

Checklist for Self-Employed (in addition to the checklists above)

- Business deductions
 - Gas or mileage (keep receipts/logs)
 - Continuing education or professional development
 - Home offices (need square footage)
 - Meals
 - Advertising
 - Etc.
- Investments

Other Important Documents

- Mortgage interest statement (1098)
- Student loan interest (1098-E)
- Tuition statements (1098-T)
- Dependent childcare expense (need receipts or documentation of amount paid)

- Personal property taxes paid in 2022
- Real estate taxes paid in 2022
- Charitable contributions (need receipts or documentation of amount paid)
- Medical expense (need receipts or documentation of amount paid)

***This is a general checklist to get you started and is not all inclusive. Please reach out if you have any questions or concerns.**