

What to Bring for Tax Preparation 2023 Tax Return

- Copies of prior 2 years returns (**new clients only**)
- Full Names, Dates of Birth and Social Security Numbers for all members of household
- **Voided check for direct deposit of possible refund**
- Copies of Driver's License for taxpayer and/or spouse

Income/Wage Statements:

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| <ul style="list-style-type: none"> • Employment income (W-2) • Subcontracting income (1099-NEC, 1099-K) • Health Coverage (1095 A,B, or C depending on where you get your health insurance) • Record of alimony received • Brokerage account year-end statements • Rental property income • Partnership, S Corp, Trust, or Estate annual statements (Schedule K-1) • Pension or retirement income (1099-R) | <ul style="list-style-type: none"> • Social security income (SSA-1099) • Unemployment income yearly statement • State/local income tax refund statement • Lottery/gambling winnings • Sale of stocks, bonds, or other assets • Gifts, prizes, or bonuses • Self-employment income • Tips earned • Interest/dividend income (1099-INT or 1099-DIV) • Income from any other source |
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Possible Deductions & Credits:

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| <ul style="list-style-type: none"> • If you own a home: <ul style="list-style-type: none"> ○ Mortgage interest statement (1098) ○ Property taxes (County & School) ○ Expenses for improving energy efficiency ○ Info on the purchase/sale of a home • If you are self-employed: <ul style="list-style-type: none"> ○ All business-related expenses ○ Health Insurance Premiums • If you have unreimbursed business expenses: <ul style="list-style-type: none"> ○ Business meals & entertainment ○ Business travel (other than meals) ○ Business mileage ○ Required uniforms or equipment ○ Job-related educational expenses ○ Home-office expenses ○ Union/Professional dues ○ Job search expenses • If you paid student expenses: <ul style="list-style-type: none"> ○ Tuition Statement (1098-T) ○ Books, and lab fees ○ Student loan interest statement ○ Grants and scholarship information ○ Proof of payment of tuition | <ul style="list-style-type: none"> • Medical & Dental expenses: <ul style="list-style-type: none"> ○ Medicines & prescriptions ○ Doctors, dentists, nurses, hospitals ○ Health & Long-Term Care Insurance premiums ○ Glasses, hearing aids ○ Travel expenses/mileage to & from doctor, dentist, hospital, or pharmacy • If you made charitable donations or volunteered: <ul style="list-style-type: none"> ○ Documentation for charitable donations (cash and non-cash) ○ Mileage log for charitable causes • IRA/SEP/529 contributions • Record of alimony paid • Child care expenses & provider information • Lottery/gambling losses (only to offset winnings) • Investment-related expenses • Rental property expenses • Federal, State, or Local taxes paid • Record of payments to household employees • Information on any Electric Vehicle purchased. |
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IRS Circular 230 Disclosures:

Pursuant to Treasury Regulations, any tax advice contained with this communication (including any attachments) is not intended or written to be used, and cannot be used or relied upon by you or any other person, for the purpose of (i) avoiding penalties under the Internal Revenue Code, or (ii) promoting, marketing or recommending to another party any tax advice addressed herein.