

2023 Checklist

Taxpayer	Spouse	Dependent(s)	Basic Information
----------	--------	--------------	-------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Name, SSN or ITIN, and Date of Birth
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Last Year's Return; Hard Copy or PDF File
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Estimated Taxes Paid

Taxpayer	Spouse	Dependent(s)	Documents Received
----------	--------	--------------	--------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Forms W-2; Wages and Tax Statements
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Forms 1095; Includes Health Insurance Marketplace Statement (1095-A), Health Coverage (1095-B) and Employer-provided Health Insurance Offer and Coverage (1095-C)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Forms 1098; Includes Mortgage Interest (1098) and Student Loan Interest (1098-E)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Forms 1099; Includes Dividend Income (1099-DIV), Interest Income (1099-INT & 1099-OID), Merchant Card and Third Party Network Payments (1099-K), Miscellaneous Income (1099-NEC or 1099-MISC), Retirement Plan Distribution (1099-R), Sale of Home or Real Estate (1099-S), Capital Gain Transactions (1099-B), Distributions from an HSA, Archer MSA or Medicare Advantage MSA (1099-SA), Unemployment Compensation (1099-G), Stimulus Payments
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Forms 2439; Notice to Shareholder of Undistributed Long-term Capital Gains
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Schedule K-1(s); Partnership, S Corporation, and Estate or Trust Income

Taxpayer	Spouse	Dependent(s)	Personal Records
----------	--------	--------------	------------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Child and Dependent Care Expenses Education
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Medical Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Vehicle (Personal Property) Taxes Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Real Estate Taxes
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Mortgage Interest Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Charitable Contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Business Farm or Rental Income/Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Unreimbursed Partnership Expenses Employee
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Gambling Expenses
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Investment Transactions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Retirement Plan Contributions
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Foreign Earned Income and Foreign Taxes Paid
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Energy Efficiency Property Expenses Alimony
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Expenses and/or Income
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Cryptocurrency bought, sold, traded or held

Taxpayer	Spouse	Dependent(s)	E-File/Print
----------	--------	--------------	--------------

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bank Information (Accounting & Routing Number for Direct Deposits/Withdrawal)
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Prior year's Self-Select PIN or Prior year's AGI (Adjusted Gross Income), Prior year Identity Theft PIN

Notes	*Please notify us of e-mail or address changes
--------------	---