

2023 INCOME TAX CHECKLIST

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INCOME ITEMS

☐ W2 from employer(s)

☐ 1099-SNN (Social Security)

☐ 1099-NEC (Self Employment)

☐ 1099-R (Retirement)

☐ 1099-G (Unemployment)

☐ 1099-DIV, INT (Investments)

☐ 1099-B (Sale of assets)

☐ 1095-A (Healthcare)

☐ 1095-B (Healthcare)

☐ 1095-C (Healthcare)

☐ W2G (Gambling/prize income)

☐ State / City prior-year refunds

☐ 1099-K (Payment/Transactions)

☐ K1 from trust or partnership

☐ Alimony received (Divorce prior to 12/31/18)

☐ Jury duty pay

☐ Rental Income

DEDUCTION ITEMS

☐ Unreimbursed medical and dental expenses

☐ State and local taxes paid

☐ Home mortgage interest & PMI

☐ Property and real estate taxes

☐ Charity & clothing donations

☐ Education expenses (1098T)

☐ Student loan interest

☐ Child-care expenses

☐ Alimony paid (Divorce prior to 12/31/2018)

☐ IRA contributions

☐ Health savings account (HSA) contributions + distributions

☐ Self-employment work expenses

☐ Rental expenses

☐ Energy efficient home improvement expenses

☐ Qualified Electric Vehicle costs

*PLEASE BRING THE FOLLOWING

- 1. Driver’s License
- 2. Dependent information (Social Security Number, Birthdate)
- 3. Bank account information for direct deposit



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