2023 Tax Document List

PLEASE NOTE: You may not have all these documents. Each taxpayer’s return is different. This is just a list for you to use as a reference. Remember: many investment and bank accounts are all online and the documents you need might have to be downloaded and printed. **Do not email us documents. All documents sent that way will be disregarded. You must use our secure portal to transmit information.** This is for your protection and ours.

Income:

1. W2 forms (all pages that you receive are needed). If you changed jobs, you need ALL W2’s.
2. Interest and Dividend Income – 1099-Int and 1099-Div forms. This might be consolidated into a combined investment statement.
3. Rental Properties – all income and expenses properly categorized.
4. Pensions/Annuities/IRA’s – 1099-R forms
5. Royalties – 1099 Forms
6. Social Security – SSA Form (this has a pink bar across the top of the form)
7. Unemployment Compensation – 1099-G (must print from your unemployment portal)
8. All K-1’s Received for all sources.
9. Miscellaneous Income – Tips, Prizes, Awards, Hobby Income, Scholarship/Fellowship Income, Canceled Debt 1099-C’s.
10. All 1099’s received – if you are a business owner, we need all the forms you received, regardless of if it is a 1099-NEC or 1099-MISC.
11. Purchases or Sales of Property – Settlement Statements

\*\*If you are a business owner, please call the office to discuss your income sources and needed documentation.

Possible Deductions & Credits

1. IRA Contributions – Roth and Traditional
2. Self-Employed Health Insurance Premiums
3. Health Savings Account forms – if dollars are deposited into the HSA from your personal funds and not through a paycheck, we need that amount.
4. State and Local Taxes paid in Calendar Year 2022
5. Medical Expenses – if you have not done this in the past, feel free to call us to see if this is something you might need
6. Mortgage Interest (1098-Int) paid, also real estate taxes if it is not on your mortgage form
7. Student Loan Interest Paid – may have to get from your online loan account.
8. Charitable Contributions – statements and receipts – if donations are Goodwill or other non-cash donations, a list with values needs to be provided
9. Child and Dependent Care Credit – Name, address and social security of the provider and the dollar amount per child.
10. Education Credits – See College Student Questionnaire for detailed information.

\*\*If you made any Estimated Federal, State, School, or City Payments, we need the amounts and date paid and which tax.

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