

2023 Tax Information Checklist



Personal Information	
Name(s):	
Address:	
Email:	Phone Number:
Please indicate bank account information for IRS to direct deposit any refund:	
Bank Name:	
Routing Number:	Account Number:
Please indicate format for your copy of tax returns PAPER PDF	
Did you receive an Identity Protection PIN (IP PIN) from the IRS or have you been a victim of identity theft? If yes, attach the IRS letter.	
Dependent Information	
	✓ if applicable
Describe any dependent changes:	
Enter name, DOB, & SSN of new dependents:	
Do you have any children under age 19 or a full-time student under age 24 with unearned income in excess of \$2,500?	
Do you have dependents who must file a tax return?	
Did you provide over half the support for any other person(s) other than your dependent children during the year?	
Did you pay for child care while you worked, looked for work, or while a full-time student?	
Income Information	
	✓ if applicable
W-2s and Records of Other Income (Form 1099), i.e.: interest and dividend income, self-employment earnings, unemployment compensation, refunds of state taxes, social security benefit statements	
Did you receive any unemployment benefits during the year? Did you receive any disability income during the year?	
Did you receive any awards, prizes, hobby income, gambling or lottery winnings?	
Do you expect a large fluctuation in income, deductions, or withholding next year?	
Sales of Securities (Form 1099-B) including date purchased, cost, and dividends reinvested	
Business income and expenses	
Rental property income and expenses	
Income from Partnerships, S Corporations, Limited Liability Co., Estate, and Trusts (Schedule K-1)	
Purchases, Sales and Debt Information	
	✓ if applicable
Did you start a new business or purchase rental property during the year?	
Did you acquire a new or additional interest in a partnership or S corporation?	
Did you sell, exchange, or purchase any real estate during the year? (provide closing/settlement statements)	
Did you purchase or sell a principal residence during the year? (provide closing/settlement statements)	
Did you take out a home equity loan this year?	
Did you refinance a principal residence or second home this year?	
Retirement Information	
	✓ if applicable
Did you make any withdrawals from or contributions to an IRA, Roth, Keogh, SIMPLE, SEP, 401(k), or other qualified retirement plan?	
Did you make any charitable contributions directly from an IRA?	

Education Information	✓ if applicable
Did you, your spouse, or your dependents attend a post-secondary school during the year, or plan to attend one in the coming year?	<input type="checkbox"/>
Did you have any educational expenses during the year on behalf of yourself, your spouse, or a dependent? If yes, attach Form(s) 1098-T and receipts for qualified tuition and related expenses.	<input type="checkbox"/>
Did anyone in your family receive a scholarship of any kind during the year? If yes, were any of the scholarship funds used for expenses other than tuition, such as room and board?	<input type="checkbox"/>
Did you make any withdrawals from an education savings or 529 Plan account?	<input type="checkbox"/>
Did you pay any student loan interest this year?	<input type="checkbox"/>
Health Care Information	✓ if applicable
Did you enroll in Marketplace Coverage through healthcare.gov under the Affordable Care Act? If so, attach Form 1095-A.	
Did you make any contributions to a Health Savings Account (HSA) or Archer MSA? Did you receive any distributions from a Health Savings Account (HSA), Archer MSA, or Medicare Advantage MSA this year?	<input type="checkbox"/>
Did you pay long-term care premiums for yourself or your family?	
Itemized Deduction Information	✓ if applicable
Did you pay out-of-pocket medical expenses (Co-pays, prescription drugs, etc.)?	
Did you make any cash or noncash charitable contributions (clothes, furniture, etc.)? If yes, please provide list. (Maintain records to substantiate your list. Contributions less than \$250 with written records or cancelled checks; contributions of \$250 or more with acknowledgement from donee organization.)	
Did you pay real estate taxes for your primary home and/or second home?	
Did you pay any mortgage interest on an existing home loan? If yes, attach any Form(s) 1098 you received.	
For any mortgage or home equity loan interest paid, were the original loan proceeds used to acquire or make substantial improvements to the home?	
Did you incur interest expenses associated with any investment accounts you held?	
Did you make any major purchases during the year (cars, boats, etc.)? Please provide purchase invoice.	
Miscellaneous Information	✓ if applicable
Did you make 2023 Estimated Tax Payments? Provide amount and date: <div style="display: flex; justify-content: space-around; margin-top: 10px;"> ___/___/___ \$ _____ ___/___/___ \$ _____ </div> <div style="display: flex; justify-content: space-around; margin-top: 10px;"> ___/___/___ \$ _____ ___/___/___ \$ _____ </div>	
Did you make gifts of more than \$17,000 to any individual?	
If self-employed, did you utilize an area of your home exclusively for business purposes?	
Do you have sufficient documentation to support child tax credits, education credits, head of household filing status, or earned income credit?	
Did you have a financial interest in or signature authority over a financial account such as a bank account, securities account, or brokerage account, located in a foreign country?	
Do you have any foreign financial accounts, foreign financial assets, or hold interest in a foreign entity?	
At any time during 2023, did you receive, sell, exchange, or otherwise dispose of any financial interest in digital assets?	
Did you make any home improvements during 2023 that qualify for the Energy Efficient Home tax credit?	
Did you purchase a new or previously-owned clean vehicle this year that is eligible for the new clean vehicle credit? If yes, attach the vehicle statement from the dealer.	