

2023 Tax Organizer Checklist

Personal Information

Name, DOB and SSN for any new dependents

Copy of Drivers License (front & back), if renewed in 2023

Bank account & routing number for direct deposit/payments

Estimated payments made in 2023

Sources of Income

W-2 Forms

1099-R Forms

1099 Forms (INT, DIV, MISC, NEC, Capital Gains)

Self-Employment Income

Unemployment Income (1099-G) obtain form online

Social Security

Rental Property

Alimony Received

State Refunds

W2-G - Gambling

1099-C

K1 Form - Partnership, S-Corp or Trust/Estate Income

1099-S - Real Property Sale

1099-Q Forms

Adjustments, Deductions & Credits

IRA, SEP contributions

Medical Expenses (including premiums & travel)

1098 Form - Mortgage Interest

Property Taxes Paid

Charitable Donations - Include amounts, dates and documents.

Rental Property expenses (including improvements)

Business Expenses (including equipment and asset purchases)

1098-T - College Tuition Paid - Include room, board, books etc.

1098-E - Student Loan Interest

Dependent Child Care - Provider name, address, tax ID & amount

Energy Efficient Purchases (Solar, Electric Vehicle, Windows, etc.)

Other Information

You must report Foreign Bank Accounts & Income

You must report Cryptocurrency transactions

1095-A - Healthcare coverage and amounts

Note: This list is meant to be guide as you gather the relevant information to assist us in accurately preparing your tax return. If you have any one-time or unusual transactions that may have tax consequences, please include that information in your submission of documents to us.