

A GENERAL LIST OF ITEMS TO BRING

PLEASE BRING ALL OF THE INFORMATION THAT APPLIES TO YOU

Contact Information:

- Updated address, phone number, and email address
- Bank account routing and account numbers for direct deposit
- Names and social security numbers of any new dependents (**For 2023 you will need to bring verification with you such as a Social Security Card or insurance record**)

NEW CLIENTS: We need a copy of your last return

Employment, Retirement, Investments and Other Income:

- W2s or 1099s for each job and/or 1099 for Unemployment compensation
- 1099R (Retirement distribution forms) and/or SSA-1099 (Social Security Benefits Received)
- K-1 Forms
- 1099-INT from Credit Unions and Bank accounts
- 1099 from Investment Brokerage accounts (Cost basis on stock sales, if not disclosed on 1099)
- Alimony received and/or gambling winnings
- Any sales of Cryptocurrency

Business or Farm: (organizer available at childrichards.com)

- QuickBooks backup along with the password
- Summary of revenue and expenses categorized by type (office supplies, advertising, training, etc)
- Miles driven (both business and personal)
- Cost, description, and date of purchase of any new assets, such as equipment, furniture, vehicles
- Health insurance premiums not paid through your employer

Rentals: (optional organizer available on our website)

- Rental income per rental unit
- Expenses categorized by type (insurance, taxes, interest, etc) per unit
- Cost, description and purchase date of any new rentals or improvements

Deductions:

- Alimony paid along with name and SSN of recipient
- Property taxes paid
- Sales tax paid on major purchases, such as vehicles, RVs, boats, etc.
- Form 1098 Mortgage interest paid
- Closing statements on new purchases or refinance of existing mortgage
- Donations listed by charity and amount

Education:

- Student loan interest paid
- 1098-T from post-high school educational institution (must be provided)
- Amounts paid for education costs (i.e. computers, supplies, books)

Health Care:

- Health Savings Account distribution forms 1099-SA
- HSA contribution forms 5498
- If you received insurance through the Marketplace: Form 1095-A provided by Health Insurance Provider

Credits:

- Day Care: Provide name, social security number, address and amount paid to each day care provider
- Documentation on any new residential energy credits such as solar panels or electric vehicles
- Did you receive a stimulus payment? We need to know how much you received
- IRS letter 6419 that tells you how much child tax credit you received

Did you make estimated payments?
We need those amounts.

****Don't forget****
Bring all correspondence
received from the IRS.

*****Experience Identity Theft?*****
Don't forget your Identity Protection
PIN issued for 2022

NEED MORE HELP?
We have several worksheets to help ensure you haven't overlooked anything. Please call our office for a personalized tax organizer or visit childrichards.com for different business organizers, tips and other useful information.