

Tax Preparation Checklist

- A copy of your tax return from the last year, if it was not prepared by us.
- All W-2 forms for wages, tips and salaries.
- Any Form 1099s you received for interest, cancellation of debt, dividends, miscellaneous income, or retirement. These include Form 1099-Int for Interest, 1099-C for the Cancellation of Debt, 1099-Div for Dividends and Distributions, 1099-Misc for Miscellaneous Income, 1099-NEC for Nonemployee Compensation, 1099-R for Distributions from Pensions, Annuities, Retirement or Profit-sharing plans, etc.

If you received any interest, dividend or other similar income not shown on a Form 1099, please provide us with the records of that income, including the payer's name, Social Security Number or Employer Identification Number and the account numbers to which such payments were credited.

- Health Care Forms such as Form 1095-A, 1095-B, or 1095-C.
- Year-end brokerage statements showing investment transactions for stocks, bonds, etc.
- Statements supporting deductions for mortgage interest and property taxes (i.e. Form 1098).
- Copies of settlement statements or invoices for large purchases or sales, such as a home, property, or vehicle, etc. in 2023.
- Any Schedule K-1s you received from partnerships, S corporations, estates or trusts of which you are an owner or beneficiary.
- Summarized business income and expenses from any unincorporated business you operated during the year (sole proprietorship). This can be in the form of *QuickBooks* (or other accounting software) data file, or paper documents such as spreadsheets or computer-generated printouts.
- Details as to any other sources of income, such as income from rents, royalties, trusts and estates, farming, retirement and any other income received during the year. If you have questions about any item of income, please be sure to bring it to our attention, so we may be determined whether it is taxable.
- Retirement Plan Contributions: The date and amount of contributions made to an Individual Retirement Account (IRA), Roth IRA, Simplified Employee Pension (SEP) or Keogh, the name of the institution maintaining the accounts of such plan, and your account number. Please provide details as to any after-tax employee contributions you made to such plans and/or matching contributions.
- Any tax notices sent to you by the IRS or other taxing authority.