



TAX RETURN CHECKLIST

- Client Name _____
- Preferred Phone # to contact you _____
- Email address _____
- What address should we have on the tax return?
Street Address _____
City _____ State _____ Zip Code _____
- Should our billing go to the same address? YES _____ NO _____
- Has your marital status changed during the past year? YES _____ NO _____
If yes, please explain. _____
- Were any children added to your family in 2023? YES _____ NO _____
If so, what is the child's name? _____ Date of birth _____
Child's social security number _____
- Has your bank information changed? YES _____ NO _____
If yes: Routing number _____ Account number _____
Name of bank _____ Checking or Savings? _____
- Have you been issued an identity protection PIN by the IRS? YES _____ NO _____
If yes, we need the letter containing the PIN sent to you by the IRS
- Did you receive a Form 1095 healthcare form from the IRS? YES _____ NO _____
If yes, please provide us a copy of it.
- Do you want a paper copy of your 2023 return? YES _____ NO _____

**PLEASE FILL OUT THIS FORM AND RETURN TO OUR OFFICE
WITH YOUR 2023 TAX DOCUMENTS**

TAX DOCUMENTS CHECKLIST

Please look over the income and expense data listed here to see which ones may apply to you.

W-2s	Wages Gambling
1099s	Interest Income Dividend Income Retirement/IRA Income Social Security Income Nonemployee Compensation (Business) Rental Income Royalty Income (Oil & Gas) Stock Sales Real Estate Sales (include Closing Statement)
1095-A	Health Insurance Credits
1098-T	Education Expenses
1099-SA	HSA Distributions
Business Income	Schedule of Income & Expense
Rental Income	Schedule of Income & Expense
Schedule K-1	Partnerships S-Corporations Trusts/Estates
Medical Expenses	Doctors Dentist Hospital Medicine - Pharmacies can provide you with a list of all your prescriptions for the year
Property Tax Payments	
Mortgage Interest Statements	
Charitable Contributions	Cash Household items (Goodwill, Salvation Army)
Child Care Expenses	
Retirement Plan Contributions	IRA Roth
Estimated Tax Payments	Amounts & dates paid