

Tax Preparation Checklist 2023



Proof of Income

- W2 forms for all jobs
- 1099-MISC for all miscellaneous income including medical billing payments
- 1099-NEC for non employee compensation
- 1099-R for pension/annuity income
- 1099-SSA for social security benefits received
- 1099-DIV for dividend income
- 1099-INT for interest paid to you

Deductions and Credits

- Real estate and personal property taxes paid
- Receipts of cash and non-cash charitable contributions
- Form 1098 listing mortgage interest paid
- Receipts/ Invoices from purchase energy efficient
- Record of estimated payments made for current tax year
- 1098-T form from the college/university attended
- 1098-E form for interest paid on student loans
- Educators, provide all receipts of unreimbursed supplies purchased
- 1095-A form showing healthcare purchased through the marketplace

Identification for all Individuals on Your Return

- Unexpired License or State ID for you and your spouse
- Social Security Cards for all family members listed on return
- Previous tax year returns (1040, 1120S, etc)
- Childcare Records with tax ID number or social security number of provider
- School or health care records for all dependents listed on return

Self Employment Income

- Copy of LLC/ Corporation Documentation
- Business bank accounts records
- Ledger recording income each month
- Receipts for expenses
- Record of any business miles
- List of clients and pricing

NOTES :

Tax Cuts and Jobs Act of 2018 eliminated many deductions that were typically used for itemized deductions; including, but not limited to mortgage insurance premiums, work uniforms and union dues, and work travel and entertainment expenses.