

Paola Tax & Accounting

"it's your money, not theIRS"

Tax Documentation Checklist for 2023

Check All That Apply to You & Provide Supporting Documents

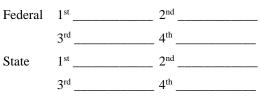
Reporting All Income

___ IRS Letter 2940C with "Pin Number" (if you have one)

- ___ Wages (Form W-2)
- ___ Interest Income (Form 1099-INT)
- ___ Dividend Income (Form 1099-DIV)
- ___ Stock Sold (Form 1099-B)
- ___ Real Estate / Home Sold (Form 1099-S)
- ____ Assets Sold (Cars, Coins, Collections)
- ___ Rent Income (Form 1099-Misc)
- ___ Faming & Cattle Income (Form 1099-PATR)
- ___ Sole Proprietor Business (Forms 1099-NEC)
- ____S-Corporation Income (Schedule K-1)
- ___ Partnership Income (Schedule K-1)
- ____ Trust & Estate Income (Schedule K-1)
- __ Oil & Gas Royalty Income (Form 1099-Misc)
- ___ State Refund (Form 1099-G)
- ___ Social Security (Form SSA-1099)
- ___ Unemployment (Form 1099-G)
- __ Gambling Winnings (Form W-2G)
- ____ Alimony Received (Divorce Before 2019)
- ___ IRA/Annuity Distributions (Form 1099-R)
- ___ Retirement Distributions (Form 1099-R)
- ___ Educational Distributions (Form 1099-Q)
- ____ Medical Savings Distributions (Form 1099-SA)
- ____ Health Savings Distributions-HSA (Form 1099-SA)
- ___ Cancellation of Debt/Mortgage (Form 1099-C)
- ___ Other Income (Jury Duty, Prizes, Awards, Etc.)
- ___ Railroad Retirement RRB-1099

Miscellaneous

___ Estimated Tax Payments (Provide Amounts)



- ____ Make gifts to individuals? (Different from charity)
- ____ Do you have any investments in cryptocurrency?

Tax Credits

- __ Child Care Expenses (Providers Name, Address, SSN or Tax ID#)
- ___ College Tuition Expenses (Form 1098-T)

Tax Deductions

- ___ Roth Conversion Done in 2023?
- ___ Student Loan Interest (Form 1098-E)
- ___ Self-Employed Health Insurance Premiums
- ____ Alimony Paid (Divorce Before 2019 Only Applies)
- ___ 529 Education Plan Contributions (State Deduction)
- ____ Unreimbursed Medical Expenses Paid-Doctor, Dentist, Eye, etc.
- ____ Total Miles Drive for Charitable or Medical Purposes
- ___ Real Estate Taxes on Personally Owned Real Estate
- ___ Personal Property Tax (Vehicles, boats, trailers etc.)
- ___ Mortgage Interest (Form 1098 Mortgage)
- __ Charitable Contribution Receipts
- ___ Non-Cash Charitable Contribution Receipts
- ___ Educators Expenses Paid (Teachers Only)
- ___ Roth & Traditional IRA Contributions (Not from Employer)

Health Insurance

_____ Health Insurance through Market Place (Form 1095A)

Business Information

- ___ Complete Business Income & Expense Form
- __Form 1099K

Rental Property Information

- Complete <u>Rental Income & Expense Form</u>
- ___ If purchased in the current tax year provide cost and date purchased for depreciation.

Farm

___ Complete Farm Income & Expense Form