



Paola Tax & Accounting

*"it's your money, not the IRS"*

# 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)
  - Federal 1<sup>st</sup> \_\_\_\_\_ 2<sup>nd</sup> \_\_\_\_\_
  - 3<sup>rd</sup> \_\_\_\_\_ 4<sup>th</sup> \_\_\_\_\_
  - State 1<sup>st</sup> \_\_\_\_\_ 2<sup>nd</sup> \_\_\_\_\_
  - 3<sup>rd</sup> \_\_\_\_\_ 4<sup>th</sup> \_\_\_\_\_
- 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 [Rental Income & Expense Form](#)
- If purchased in the current tax year provide cost and date purchased for depreciation.

## Farm

- Complete [Farm Income & Expense Form](#)