



Tax Appointment Checklist Tax Year 2023

In order for us to prepare you tax returns accurately, please use this checklist to be sure you have all the information needed to complete your tax return. If you have questions, just give us a call at 828-277-4177!

Personal Information

- Please complete one of our Client Info Worksheets
- Current Driver's License or Current Picture ID
- Social Security Card(s) for you and the Dependents you are claiming
- Copy of Last Year's Federal and State Tax Returns (if new client)

Income

- Form W2 – Wage Statements from your job
- Form 1099-R – Pension or Retirement Income from IRA or 401K
- Form 1099-G Unemployment Income
- Form SSA-1099 Social Security Income
- Form 1099-INT & 1099-DIV – Interest and Dividend Income
- Form 1099-MISC Misc Income including Contract Labor, Rents, Prizes
- 1099-B – Sale of Stock or Bonds
- Form W2G Lottery or Gambling Winnings
- Alimony Received
- Jury Duty
- Repayment of Homebuyers Credit (2008-2009)
- Schedule K1 Income from Partnerships, S-Corporations, Trusts & Estates

Adjustments & Deductions

- Educator Expenses
- Health Saving Account Contributions
- IRA/401K Contribution
- Alimony Paid
- Student Loan Interest Paid
- Medical, Dental, Eye Care Expenses Paid
- Real Estate Taxes Paid
- Mortgage Interest Paid
- Charitable Contributions
- Investment Expenses
- Gambling Losses

Credits

- Child & Dependent Care Expenses
- Education Expenses (College)
- Residential Energy Improvements (must meet required standards)
- Electric Vehicle Credit

Customized Worksheets

If any of these other issues apply, please complete the appropriate sections of our 2023 Client Organizer

- Itemized Deduction Worksheet
- Office in Home Worksheet
- Auto Expense Worksheet
- Self-Employed Worksheet
- Farming Income Worksheet
- Rental Income Worksheet
- Sale of Your Home
- Bankruptcy & Debt Forgiveness

Health Care Information

- Form 1095-A if insured through the Healthcare Marketplace (required)

Other Income or Deductions not listed

You might find our 2023 Client Organizers are helpful if you are Self-employed, have rental property or other income & deductions that need listed and itemized.