

## ENGLISH CHECKLIST 2023

Before you begin to prepare your income tax return, go through the following checklist. Highlight the areas that apply to you, and make sure you have that information available. Better yet, attach the list to a folder of your tax return documents, and check items off as you add them to the folder.

### TAX PREPARATION CHECKLIST FOR INDIVIDUALS AND SMALL BUSINESS

- COPIES OF LAST YEAR'S TAX RETURN
- SOCIAL SECURITY NUMBERS AND DATE OF BIRTH FOR YOU, YOUR SPOUSE AND ALL YOUR DEPENDENTS
- DIRECT DEPOSIT, BANK ACCOUNT NUMBER AND ROUTING NUMBER
- PREPARE A PROOF FROM YOUR DEPENDENTS LIVED IN USA IN THIS CALENDAR YEAR
- ID FROM YOU AND YOUR SPOUSE

### RESOURCES OF INCOME

- W-2 FORMS FOR YOU AND YOUR SPOUSE
- 1099-G FORMS FOR UNEMPLOYMENT INCOME, STATE OR LOCAL REFUNDS
- 1099-NEC NON EMPLOYEE COMPENSATION
- 1099-K FROM ANY INDEPENDENT CONTRACT WORK
- 1099-R FORM RETIREMENT, PENSIONS DISTRIBUTIONS
- 1099-S SALE PROPERTY
- 1099-INT INTEREST INCOME
- 1099 DIV, DIVIDENDS INCOME,
- 1099-B INVESTMENT STOCK SALES, OR CRYPTO etc...
- K-1 PARTERSHIP OR CORPORATIONS
- SSA-1099 SOCIAL SECURITY BENEFITS
- W-2G LOTTERY OR GAMBLING WINNINGS
- 1099-C FOR CANCELACION OF DEBT
- 1095-A HEALTH INSURANCE
- 1095-B HEALTH INSURANCE
- 1095-C HEALTH INSURANCE
- OTHER INCOMES

## ITEMIZE DEDUCTIONS & CREDITS

- DAY CAMP & CHILD CARE EXPENSES, NAME, ADDRESS, TAX ID
- UNREIMBURSED EMPLOYEE EXPENSES (UNIFORMS, SUPPLIES, TRAVEL, MILEAGE, etc)
- TEACHER'S UNREIMBURSED EXPENSES
- 1098 HOME MORTGAGE
- REAL STATE TAXES PAID
- UNION DUES
- DONATIONS: CASH DONATIONS, CHARITABLE DONATIONS, OFFICIAL CHARITY RECEIPTS,
- PERSONAL PROPERTY TAXES
- VEHICLE FEES REGISTRATION
- MEDICAL EXPENSES, DENTIST, OPTALMOLOGICS EXPENSES,
- 1098-E FORM STUDENT LOAN INTEREST
- 1098-T FORM EDUCATIONS TUITION COST AND EXPENSES
- IRA CONTRIBUTIONS
- ENERGY-EFFICIENT HOME IMPROVEMENTS
- MSA-MEDICAL SAVINGS ACCOUNT
- IRA DISTRIBUTIONS
- HSA TAXABLE DISTRIBUTION
- INTEREST EXPENSES
- THEFT OR LOSSES
- ADOPTION EXPENSES

## SMALL BUSINESS

- BUSINESS INCOME & EXPENSES (PROFIT & LOSS STATEMENT)
- EQUIPMENT, EXPENSES AND DEPRECIATION INFORMATION
- RECORD BUSINESS USE OF HOME EXPENSES, OFFICE SIZE.
- RENTAL PROPERTY INCOME, EXPENSES & RENTAL LOSSES, INSURANCE (PROFIT & LOSS STATEMENT)
- UBER DRIVER, LYFT, DOORDASH ...etc. . INCOME & EXPENSES

## TAXES PAID IN ADVANCE

- ESTIMATED TAXES PAID IN ADVANCE DURING THE YEAR (SEL-EMPLOYMENT)