



## IT'S 2024 TAX SEASON!!!!!!

Here is a checklist of documents you may need to help ensure you file your 2023 taxes accurately.

### WHAT TO BRING CHECKLIST

- ALL TAXPAYERS:** An unexpired government issued photo ID or passport and social security cards or Tax ID letters (ITIN).
- FOR ALL DEPENDENTS:** Photo ID (*if applicable*), birth certificates, social security cards or Tax ID letters (ITIN). Proof that dependent was present in the US and lived with you during the year such as records for school or childcare enrollment and attendance, government benefit or assistance letters, medical care or health insurance letters, legal court custody or adoption documents, legal or financial documents, rental property lease.
- HEALTH INSURANCE:** Form 1095-A, if you are enrolled in an insurance plan through Marketplace (Exchange).
- ALL INCOME STATEMENTS:** Form W-2 (wages), Form 1099-NEC (self-employment), Form 1099-MISC, Form 1099-K (payment card and third-party network transactions), Form 1099-G (unemployment), Form W-2-G (gambling winnings) **including** loss report, Form 1099-R (pension/retirement), Form 1099-DIV (dividends), Form 1099-INT (interest), Form SSA-1099 (social security benefits), Form 1099-B (stock sales), Form 1099-SA (health savings account), transactions involving cryptocurrency (virtual currency), and any other document(s) showing income.  
**Income of dependents and/or spouse in your home.**
- SELF-EMPLOYED OR IF YOU OWN A BUSINESS:** Form 1099-NEC, Schedule K-1, business income records to verify amounts not reported on 1099-NEC, business registration documents.  
**Expenses:** Records or reports of all expenses including bank and/or credit card statements, receipts, records of checks written and mileage log record. List of business use asset/equipment (including cost, date placed in service, etc.).  
**Home Office:** Square feet of home and area used for business. Record of home-related expenses like utilities and rent or mortgage.  
**Tax Payments:** Records of estimated tax payments made throughout 2023.  
**Rental Income:** Records of income received, and expenses paid.
- COLLEGE STUDENTS:** Form 1098-T **including** payment history for tuition and expense receipts for supplies, books and equipment paid. Form 1098-E, if you paid student loan interest.
- EDUCATOR EXPENSE:** Receipts for classroom expenses or supplies purchased (for educators in grades K-12).
- IF ITEMIZING DEDUCTIONS:** Provide expense records such as Form 1098 (mortgage interest form), real estate and personal property tax payments, receipts for unreimbursed medical or insurance paid, charitable contribution receipts (church/organization letter or donation document), last year's state refund amount.
- CHILDCARE EXPENSE:** Document from childcare provider **including** business name, address, social security/ITIN or EIN number, and amount paid for year.
- FOR DIRECT DEPOSIT OR PAY TAX BALANCE DUE:** Voided Check or Account Information such as bank routing number, account number and type of account.
- IDENTITY PROTECTION PIN (*if applicable*):** IRS Letter CP01A received for you, your spouse, or your dependents by IRS.
- FOR NEW CLIENTS:** Bring your prior year tax return (mandatory).