



Checklist of Items Needed for Your 2023 Tax Return

Check the blocks of any applicable items and attach corresponding documents/information.

Income Information:

- Wages (Form W-2)
- Interest Income (Form 1099-INT)
- Foreign bank accounts, income +/- or paid taxes
- Dividend Income (Form 1099-DIV)
- Pension Distributions (Form 1099-R)
- Social Security Benefits (Form 1099-SSA)
- State / Local Refunds (Form 1099-G)
- Gambling Income (Form W-2G)
- Stock Sale Information/Capital Gains (Form 1099-B)
Include each stock sale, date purchased, number of shares bought, amount paid

Other Income (any other income earned):

- Alimony Received (Recipient name and SSN)
- Tip Income
- Unemployment Compensation (Form 1099-G)
- Scholarships (Form 1098-T)
- Debt Cancellation (Form 1099-C)
- Education Savings Account Withdrawal (Form 1099-Q)
- Disability Income Bartering Income (Form 1099-B)
- Jury Duty
- Achieving Better Life Experience Distrib. (Form 1099-QA)

Small Business Items (self-employed or independent contractor business owner):

- Business Income (Form 1099-MISC plus items not on 1099-MISC)
- Business Expenses (Provide list)
- Vehicle Information for business use

Rental Property:

- Rental Income (Form 1099-MISC)
- Related Expenses (Provide list)

Partnership, S-Corp, Trusts:

- Schedules K-1 from Partnerships, S-Corps, Trusts

Sale of Real Estate not qualifying for Personal Residence Exemption

- Closing Statement – Sale of Property
- Closing Statement – Purchase of Property
- List of additions/improvements while you owned the property
- Forgiveness of Debt income (Form 1099-C or 1099-A)

Stay ahead of the game and start your 2023 tax return today by contacting me at: 315-557-6604 or dps@saunderscpaservices.com

Deduction Information:

- IRA Contributions
- SEP, Simple, Keogh Plans
- Student Loan Interest (Form 1098-E) Out of Pocket
- Student Expenses (Forms 1098-T & 1099-Q)
- Alimony Paid (recipients name and SSN)
- Mortgage Interest (Form 1098)
- Investment Interest
- Cash and Noncash Charitable Contributions Other
- Business or Disaster Casualty/Theft Loss
- Real Estate Taxes
- Other Taxes (sales tax paid on the purchase of automobile, boats, RVs for personal use)

Medical Expenses:

- Health Insurance
- Out of pocket medical expenses and Form 1099-SA
- Forms 1095-A, 1095-B & 1095-C
- Healthcare Marketplace Exemption
- Medical Account Contribution (Form 5498-SA)
- ABLE Account Contribution (Form 5498-QA)

Credit and Payment Information:

- Childcare Expenses (Provide name, address, SSN or EIN and amount paid for each child)
- Tuition Statements (Form 1098-T) & Education Expenses
- Copy of voided check (for direct deposit of refund information)
- Estimated tax payments (dates and amounts paid)
- Energy or electric vehicle tax credit information
- Legal papers for adoption, divorce or separation involving custody of your dependent children
- Closing statement for first-time or long-time homebuyers' credit

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