

It is that time of year again! To file your 2023 tax return it is imperative that you review this letter and bring all documentation listed below. This is not an exhaustive list, so please bring anything marked important tax documents. You may need to get some documents online. **If you received healthcare through the Marketplace you MUST have your 1095A form of your filing will be rejected by the IRS!!**

PERSONAL INFORMATION NEEDED:

- Tax payer number: Social Security Card (SSN) or Individual Taxpayer Identification Number (ITIN) DRIVERS LICENCE
- IPIN Security pin provided Each Year by IRS via mail. (If you have one)
- Home Address & County
- Dependent Information (Full Legal Name, Date of birth, Social Security Number) For each Dependent
- Did you have a foreign bank account Y/N
- Did you receive, sell or exchange cryptocurrency? Y/N

DOCUMENTS TO BRING:

- W-2s for each job held during the tax year.
- 1099s All other income reported to the IRS. Includes dividend income (1099-DIV), interest income (1099-INT & 1099-OID), merchant card and third party network payments (1099-K), 1099-NEC for non-employee compensation, miscellaneous income (1099-MISC), retirement plan distribution (1099-R), and unemployment compensation (1099-G), State Tax Refund, Unemployment, Social Security, Health Care Reimbursement, Gambling winnings (1099G) and associated gambling losses.
- 1098s payments you've made (property taxes, mortgage payments, student loans).
- 1095-A if you received credit from the healthcare.gov marketplace.
- Income or interest statements received from savings accounts or investments.
- Bank account numbers: If you wish to receive your refund by direct deposit, you will need to bring a voided check.

- ❑ Record of Estimated Tax Payments Made: Date and Amount Paid
- ❑ Copy of Last Two Years Taxes, if we did not complete the taxes for you.
- ❑ 1099-C Cancellation of Debt
- ❑ Sale of home or real estate (1099-S) Original cost and improvement costs, original date of purchase and Date of Sale (HUD statements for both purchase and sale).

ITEMIZED AND OTHER DEDUCTIONS AND EXPENSES:

- ❑ Education Expenses: Scholarships, Student Loan Interest, Itemized receipts of qualified educational expenses (Form 1098-T).
- ❑ Child & Dependent Care Expenses: Name, address, Tax ID or Social Security Number of the child care provider.
- ❑ Business Expenses and Assets: For self employed individuals Educator expenses: If you are a teacher.
- ❑ Charitable Contributions: Detailed list of donations. Have receipts for contributions over \$250.
- ❑ Vehicles: Vehicle sales tax paid, personal property tax statement for each car, total miles driven for personal use/business. Detailed log of miles.
- ❑ Homeowners: Mortgage interest statement (Form 1098), Real estate taxes paid, Statement of Property Tax Payable in tax year.
- ❑ Retirement/IRA: Amount contributed to an IRA/Sep/Simple, and total value as of December 31st of tax year.
- ❑ Moving Expenses: Now only for Military on active duty
- ❑ Alimony Expenses: Ex-spouse's full name and social security number. Alimony is no longer deductible for any agreement modified or executed after 12/31/2018
- ❑ Healthcare Expenses (MA RESIDENTS MUST PROVIDE STATE FORM)
- ❑ Energy Saving Home Improvements: New limitations apply – credit may be possible for residential energy/solar has credit
- ❑ Electric vehicle purchase-need all documentation of purchase
- ❑ Foreign Taxes Paid
- ❑ Casualty & Theft Losses: This deduction is suspended unless in a federally declared disaster area.

There is an extra layer of security to prevent fraud in certain tax credits and or filing status. These include, but are not limited to, filing Head of Household, the Earned Income Tax Credit, Child and Dependent Care Credit and Education Credits. It is our responsibility as preparers to ask questions to ascertain the validity of tax credits and filing status, and have taxpayers sign off on these credits.