

## 2023 Income Tax Document Checklist

Please provide us with the following documentation/information during your tax appointment or include them if mailing to the office.

The existence of any/all documents will depend on your particular tax situation.

**\*NEW\***

\_\_\_\_\_ **Any cryptocurrency transactions**

<b><u>FORM</u></b>	<b><u>(X)</u></b>	<b><u>DESCRIPTION</u></b>
W-2's	_____	From all employers and copy of your last pay stub
W-2G	_____	Gambling winnings
1099-INT	_____	Interest income from banks, insurance companies, & financial institutions
1099-DIV	_____	Dividend income from banks, corporations, and financial institutions
1099-B	_____	Stock sales & hedging gains/losses
1099-C	_____	Debt Cancellation
1099-K	_____	Payment Card and Third Party Network Transactions
1098-E	_____	Interest paid on college loans
1099-G	_____	State tax refunds, unemployment, USDA, and other government payments
1099-MISC	_____	Rent received, custom work, **crop insurance proceeds, prizes
1099-PATR	_____	Patronage Dividends
1099-R	_____	IRA, pension and annuity distributions
1099-S	_____	Proceeds from Real Estate Transactions
1099-SSA	_____	Social Security benefit statements
1098-T	_____	College tuition statements
1098	_____	Mortgage interest on a house, farmland or other property
K-1 Schedules	_____	Partnerships, S-Corporations, LLC's, Estates and Trusts
1095-A, B, C	_____	Health insurance premium information provided by your provider
1099-SA	_____	HSA Distributions
Other:	_____	<b>Real Estate Tax Statements for taxes paid</b>
	_____	Closing Statement on Sale of Personal Residence
	_____	Sales Tax paid on purchases of Autos, Boats, Planes & Motorcycles
	_____	Contributions to SEP, IRA, SIMPLE Plans, and HSA's
	_____	Birth date & Social Security card for any new dependents for year
	_____	Daycare providers name, address, social security number and amount paid
	_____	Dated invoices of all major purchases or sales (equipment & investments)
	_____	Bill of Sale for assets purchased
	_____	
	_____	E-mail addresses for communication purposes
	_____	Cell phone number, if available

\*\* Please bring in **ALL** documents pertaining to crop insurance proceeds

**NOTE:** We have worksheets in our office & published on our website to help you prepare for your upcoming appointment. Some of these include Farm, Self-Employed Business Operations, Itemized Deductions, Rental Income & Expenses, and Daycare & Home Office worksheets.