PERSONAL TAX RETURN - 2023 CHECKLIST

This list is **not** inclusive. Some items may not apply. It is a quide to assist you in gathering information for preparation of your personal tax return. Backup documentation for all deductions will be required in the event of an audit. Please complete, sign, and date the back page. THANK YOU! **YES** NO RECEIVED THE MN SURPLUS PAYMENT? \$ AMT_ (NEW & REQUIRED) Filing status change (i.e. married, single, etc.) Address change New dependents (birth date, social sec card) / No longer eligible- (is child claiming self??) Name Birthdate SS# SS# Name Birthdate SS# Name Birthdate Proof of estimated taxes paid: please provide check #s or copies showing dates and amounts At any time during 2023, did you receive, sell, send, exchange, or otherwise acquire any financial interest in virtual currency? FOREIGN bank accounts (do you have any?) ___ chk or sav? ___ DIRECT DEPOSIT: bank _____ Acct # Wages FORM W-2 Interest and/or Dividend Income - FORM 1099-INT and/or FORM 1099-DIV Alimony received OR paid (Date of divorce) Pension/Annuity/IRA withdrawal/rollover - FORM 1099-R Unemployment received - FORM 1099-G Social Security received - FORM 1099-SSA П Gambling winnings FORM W-2G Stock/Mutual Funds sales transactions - FORM 1099-B Need **BASIS** information (purchase date, purchase price, and number of shares) Itemized Deductions: Medical expenses paid out of pocket AFTER insurance or FSA reimbursement: (mileage Drs, Copays, Chiro, vision, dentist Health/dental/vision ins (only if paid out of pocket, not through paycheck) Long Term Care Insurance Policy #_ Holder Premium Carrier Policy # Premium Holder Carrier FORM 1095-B or 1095-C Health Coverage (not required) OR FORM 1095-A Health Ins Marketplace Statement (may include premium tax credit)(REQUIRED) Real estate taxes on all personal homes License tabs for vehicles Mortgage interest statements - FORM 1098 (principal residence and/or 2nd home) If refinanced: loan origination fees, date, length of mortgage (closing statement is preferable) Charitable Contributions-must have receipts mileage_____ (cash/check) noncash (need receipts if over \$500)

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YES	NO	
		Subject to 2% of adjusted gross income for States only (suspended by Federal)
		Non-reimbursed employee business expenses: amts by categories & amt reimbursed
		Mileage
		Job hunting expenses (provide amounts by detailed categories)
		Tax preparation fees safe deposit box
		Advisory/investment fees
		Gambling losses
		K-1s from Partnerships, S Corporations, Trusts, Estates
		Rental property income and expenses (expenses must be itemized) must have complete address
		Sale or purchase of real estate - include closing stmts for each
		Education:
		Tuition Statement - FORM 1098 T
		Student Loan Interest - FORM 1098 E
		Education Savings Withdrawals - FORM 1099 Q
		Section 529 Education Savings Plans CONTRIBUTIONS - need details (States only)
		12/31/23 statement for each child or
		account number, name on account, beneficiary, basis as of 1/1/23, amount contributed
		basis as of 12/31/23
		Kindergarten thru 12th grade school expenses PER CHILD (must have receipts) - MN ONLY
		MSA (medical savings acct) / HSA (health savings account): \$ contributed - FORM 5498-SA
		MSA (medical savings acct) / HSA (health savings account): \$ distributed - FORM 1099-SA
		IRA contributions (per individual) - Traditional or Roth
		Moving Expenses (new job more than 50 miles; other rules may disallow) States only
		Daycare provider information (AMTS MUST BE BY CHILD):
		Federal ID #
		Name
		Address
		Amount pd PER CHILD
		Residential Energy credits on principal residenceQualifiedwindows, exterior doors, insulation
		new furnace, a/c, water heater, (invoice required)
		Prior Year Federal and State Tax Return (new clients only)
TAMPANED SIGNATURE		
TAXPAYER SIGNATURE PRINTED NAME DATE		
SPOUSE SIGNATURE PRINTED NAME DATE		