

# PLEASE COMPLETE THE ATTACHED CHECKLIST

Have questions? Please email: [CPA@UnderstandYourTaxes.com](mailto:CPA@UnderstandYourTaxes.com)

## 2023 Tax Return Information

Name \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_\_\_  
Spouse \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_\_\_  
Dependent \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_\_\_  
Dependent \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_\_\_  
Dependent \_\_\_\_\_ SS# \_\_\_\_\_ DOB \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ Zip \_\_\_\_\_  
Phone: \_\_\_\_\_ Email: \_\_\_\_\_  
Your Occupation: \_\_\_\_\_ Spouse's: \_\_\_\_\_

### ***Documents required to be sent to the CPA:***

- W2's or 1099's** - Received from employers
- 1099-DIV or INT** - Bank & Investment statements (received Jan 2024)
- Form-1099-B** - Stock and mutual fund sales (received Jan 2024)
- Form 1098** - Mortgage interest statement
- Form 1099-SA** IF *you used HSA account* for medical expenses in 2023
- Form 1098-T** College tuition fees statement

**Special notes/questions for me this year:** \_\_\_\_\_

\_\_\_\_\_

If you want refund quickly direct-deposited or Taxes due withdrawn

Routing #: \_\_\_\_\_ Acct #: \_\_\_\_\_

### I. INCOME

1. Contractor Income / Side-work (**NOT your w2**) – Ask Ken for “Business Checklist”
2. Rental income – Ask Ken for “Rental Checklist”
3. Did you take any money **out of** an IRA or 401K in 2023? SEND ME THE 1099-R
4. Did you acquire or sell any virtual currency in 2023? YES/NO

### II. DEDUCTIONS/TAX CREDITS

1. Medical expenses ONLY if more than 7.5% of your income \$ \_\_\_\_\_
2. Amounts paid for county taxes paid for **house** \$ \_\_\_\_\_ & all **vehicles** \$ \_\_\_\_\_
3. Charitable Donations - Cash \$ \_\_\_\_\_ and Goods \$ \_\_\_\_\_ ← **Do NOT exceed** \$500
4. Traditional **IRA** contributions: \$ \_\_\_\_\_ **Do not include ROTH IRA/401k**
5. Did you buy electric vehicle or windows/doors/water heater/HVAC? Circle YES or NO
6. Daycare: Amount paid: \$ \_\_\_\_\_ Facility's Federal Tax ID # \_\_\_\_\_  
Facility Name and FULL Address: \_\_\_\_\_  
Did you use Flexible Spending Account to pay for any of this? Circle YES or NO