

# TAX PREP CHECKLIST

Name: \_\_\_\_\_

Drop off date: \_\_\_\_\_

Phone number: \_\_\_\_\_

Tax preparer: \_\_\_\_\_

Email: \_\_\_\_\_

## CHANGES TO PERSONAL INFORMATION

1. Do you have a change of address?  Yes  No

\_\_\_\_\_

*Street Address*

\_\_\_\_\_

*City*

\_\_\_\_\_

*State*

\_\_\_\_\_

*Zip Code*

2. Is there a change in your filing status?  Yes  No

Single  Married  Head of Household

*(If newly married in 2023, you must include copy of spouse's ID and Social Security card.)*

3. Do you have a new dependent to claim?  Yes  No

Full name: \_\_\_\_\_

DOB: \_\_\_\_\_ SSN: \_\_\_\_\_

*(You must include copy of social security card.)*

4. Do you want to change your banking information for tax refunds and/or withdrawals?  Yes  No

Account no. \_\_\_\_\_

Routing no. \_\_\_\_\_

Checking  Savings

5. Did you (or your spouse) renew your Driver's License in 2023?  Yes  No

Taxpayer

Spouse

Issue date: \_\_\_\_\_

Issue date: \_\_\_\_\_

Expiration date: \_\_\_\_\_

Expiration date: \_\_\_\_\_

Any other changes we should know about?

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

## MANDATORY QUESTIONS

Yes  No Did you receive unemployment benefits for any portion of the year? If "Yes," you must provide Form 1099-G.

Yes  No Did you sell, exchange, or dispose of any virtual currency?

## TAX FORMS AND DOCUMENTS

### INCOME & OTHER TAX FORMS

- W-2s and 1099s for all forms of income or investments
- Form K-1 from a business tax return
- Schedule C (self-employment) information, including any short-term gig jobs
- Schedule E (rental) information
- Did you purchase health insurance through the Marketplace? Attach Form 1095-A
- Tuition forms 1098-T and receipts or student loan interest form 1098-E
- Did you receive an Identity PIN letter from the IRS?

## ESTIMATED TAX PAYMENTS

	Federal Estimates Paid		State Estimates Paid		City Estimates Paid	
	Amount	Date Paid	Amount	Date Paid	Amount	Date Paid
1 <sup>st</sup> Quarter	_____	_____	_____	_____	_____	_____
2 <sup>nd</sup> Quarter	_____	_____	_____	_____	_____	_____
3 <sup>rd</sup> Quarter	_____	_____	_____	_____	_____	_____
4 <sup>th</sup> Quarter	_____	_____	_____	_____	_____	_____

## AWKNOWLEDGEMENT

Please thoroughly read the following statements and sign at the bottom to acknowledge and confirm your understanding.

- We will depend on you to provide the information needed to prepare complete and accurate returns.
- We will not audit or otherwise verify the data you submit for fraud or other irregularities.
- Our fee is based on the time required at standard billing rates and is subject to change based on time, number of forms, and/or the complexity of your return.
- We will return your original records at the end of this engagement, which should be stored for up to seven years.
- If you receive an IRS notice regarding this tax year, it must be submitted to us within 14 days of the notice. Additional charges may apply.

Taxpayer: \_\_\_\_\_ Date: \_\_\_\_\_