

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?

Yes No Did you have Marketplace Insurance? If "Yes," you must provide Form 1095-A.

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 st Quarter	_____	_____	_____	_____	_____	_____
2 nd Quarter	_____	_____	_____	_____	_____	_____
3 rd Quarter	_____	_____	_____	_____	_____	_____
4 th 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: _____