

# EDDIE'S BOOKS

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## CHECKLIST - 2023 TAX RETURN

Please use this general checklist to assist you in gathering your tax records.  
If you are a **new client**, please bring a copy of last year's tax return.

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1. Unexpired Driver License or State ID for each taxpayer.
2. For new dependents we'll need their Social Security number and date of birth.
3. W2s, 1099s, Social Security statements, and other tax documents.

Other documents including, but not limited to:

- Mortgage interest statements
- Property tax statements
- Stock or asset sale information
- Small business income and expenses
- Interest income statements
- Dividend income statements
- Rental income and expenses
- DMV license fee or purchase contract

4. Real estate transactions: final closing statements, for any sales, purchases, and refinances. 593 forms (for California properties) and 1099-S from escrow on all properties sold
5. Contributions to charitable institutions -- totals for cash, check, or items.
6. Information for possible credits, including plug-in electric vehicles, solar panel contracts, Retirement contributions (IRA statements)
7. Dependent Care expenses: EIN or Social Security number of the provider, along with name, address, phone number, and amounts.
8. Education expenses: tuition receipts and form 1098-T- Please have these documents available for your preparers. Also, Student Loan Interest, shown on form 1098-E.
9. Medical expenses (only if it exceeds 7.5% of your adjusted gross income) including doctor and specialist visits, hospital and surgery out-of-pocket costs, prescriptions, and medical mileage.
10. Health insurance: Forms 1095-A, 1095-B, or 1095-C.
11. Estimated Federal & State estimated payments, if applicable. We'll need the amounts and dates paid.