



## 2022 Individual Tax Information Checklist

To have your return completed by April 18<sup>th</sup> we must receive all of your tax information by **March 9<sup>th</sup>**. If we have not received your information by April 1<sup>st</sup> please call us to request an extension, we must hear from you prior to filing an extension (all extensions are filed with \$0 payment unless you let us know you think you need to make an extension payment). We cannot guarantee April 18<sup>th</sup> delivery if we do not have your information by the dates requested. **Please note our office closes at 10am on April 18<sup>th</sup>**

Birthdates of the taxpayer, spouse and any dependents – please provide a list and copy of social security card for any new dependents.

- Original Form(s) W-2
- Schedule(s) K-1 from partnerships, S-corporations, estates or trusts (other than ones prepared by our firm)
- Information regarding contributions to an IRA or pension or other retirement plan, or notify us of the contribution you plan to make.
- Form(s) 1099 or statements reporting dividend, and interest income
- Form(s) 1099-R reporting retirement income
- Form(s) 1099-SSA from the social security administration (this is the pink and white form reporting total benefits paid, not your monthly benefit determination letter)
- Form(s) 1099-MISC and any other 1099(s) reporting other income
- Broker statements providing details of capital gains transactions (please provide both the year-end tax reporting statement and the December 2022 account statement). Please review these gain/loss calculations for any missing basis information and be sure to provide us any missing information related to purchase dates and purchase prices. If you bought or sold cryptocurrency you must contact us regarding information we will need.
- Summary of Schedule C business income and related expenses, including business mileage totals
- Form(s) 1098(T) college tuition stmts as well as a summary of actual tuition, books and educational expenses paid.
- Form(s) 1098 reporting mortgage interest paid
- Copies of real estate tax bills paid during 2022
- Summary of medical expenses paid during 2022, including medical related travel expenses and mileage
- Summary of charitable contributions and charitable mileage
- Legal documents pertaining to the sale or purchase of real property (i.e. HUD closing stmts) for both the purchase and sale of the property

**\*\*\* Please take a moment to make sure we have current contact information please check box if your address has changed during 2022 or in 2023 (Please do not assume we know) \*\*\***

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

Telephone Information

Home: \_\_\_\_\_

Address: \_\_\_\_\_

Work: \_\_\_\_\_

address change \_\_\_\_\_

Cell: \_\_\_\_\_

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