

Documents Needed to File your Taxes – Tax Year 2023

Personal Info: Prepare Cover Page with • Current Address • Phone Numbers (day & evening) • Email • Occupation • Date of Birth • All States & Dates you lived in during the Tax Year. **If married;** Provide Spouse's Info • Legal name (as listed on social security card) • Occupation • Date of Birth. **If you have Children, for each child:** • Legal Name • Date of Birth • Social Security Number.

Driver's License Copy of Driver's License and **If married:** Copy of Spouse's Driver's License

Income Forms: whichever applies to you: • W-2 Forms • 1099 Forms • Interest Income • Dividend Income • K-1 Forms • Pension or IRA Distributions Forms • Brokerage Account Forms • Student Loan Interest Forms.

Deductions: Summarize Deductions: • Medical Expenses • Auto Excise Tax • Interest on Mortgages and Home equity Loans (attach applicable 1098 Forms) • Mortgage Insurance Premiums • Real Estate Taxes • Casualty and Theft Losses • Cash and Non-cash Charitable Donations (attach receipts for non-cash donations).

If you sold Stocks or Mutual Funds: Prepare a spreadsheet with: • Date you bought "each" item that was sold • Total purchase price of "each" item sold • Note: Do not assume your cost information is provided on Form 1099B. Review all your stock sales on form 1099B to ensure you have the purchase date and cost information for each stock or mutual fund sold during the year. • All 1099B forms, we need them during your appointment.

If converted Traditional IRA to a Roth IRA Indicate the amount of any applicable after-tax Traditional IRA Contributions you made over the years.

If Graduate School Expenses qualify to be Deducted

Summarize amount PAID in Tuition and Books DURING 2023. (Tuition may include Loans credited to the University DURING 2023) • If Scholarships/Fellowships exist, provide Amount Received DURING 2023. • Form 1098T (Tuition Statement. Note: 1098T represents tuition BILLED. You can ONLY DEDUCT Tuition PAID, BILLED & PAID are not always the same) • All Tuition Billing Statements • Receipts for computers and peripherals you purchased for school during 2023. • Provide Amount of any Tuition Reimbursed by your employer • Copy of your most recent Resume.

[Do you Qualify to Deduct Graduate School Expenses?](#)

If you paid for Dependent Care Expense

Provide Each Providers': • Name • Address • Federal Id Number or Social Security Number • Amount Paid.
Provide for each Child Cared For: • Name • Total Amount Paid. • If you use a Nanny Tax Service to handle the employment taxes, please provide your Completed Schedule H.

If you were self-employed during 2023:

Cover page with: • Summary Gross Self-Employment Income during the year • Applicable expenses categorized and summarized by the Type of Expense (i.e. advertising, equipment, supplies, etc.)

If you owned rental property during Tax Year 2023

Cover Page showing •Gross Rental Income you received •Applicable Expenses categorized and summarized by the type of expense (i.e., advertising, mortgage interest, real estate taxes, repairs, maintenance, condo fees, etc.). •Date when you started renting the property, •How much you Originally Paid for the property less Value of the land on the Purchase Date •FMV Fair Market Value of the property.

If you used the property as a vacation home specify •Total number of days you personally used the property during Tax Year.

If Deducting a Portion of your Home for Business Use

•Calculate the square footage of the area used for business. In addition, we will need to know the date you began using the space for business, how much you originally paid for the property and a summary of your utility expenses (gas, electric, oil, condo fees, landscaping, snowplowing, maintenance, etc.), major home improvements and direct office expenses (repairs, business phone, etc.).

If you did NOT live outside the United States in 2023 and you had Foreign Financial Assets

such as Bank Accounts, Brokerage Accounts, Foreign Partnerships, etc. where Total Value of Foreign Assets was more than \$50,000 (\$100,000 if married) on the LAST DAY of the tax year or more than \$75,000 (\$150,000 married) at ANY TIME during 2023 please complete and bring Form 8938. [Download Form 8938](#). See [More about Form 8938](#).

If you lived abroad during 2023:

See what you need at this [link](#).

If you are a Foreign National on a F-1 or J-1 Visa:

• VISA and Passport •Cover page with: Permanent Address where you are a citizen and F-1 or J-1 VISA number. / Actual dates Entered and Left the United States in 2023 / Number of days you were in the United States for during 2021, 2022 and 2023.

If you need ITIN Number

• Fill out the Intake Form and provide a valid passport and Foreign Address.

A Cancelled Check ...so that we can obtain your Direct Deposit information.

If you made any Estimated Tax Payments for 2023

provide the Date Paid and Amount Paid of all Federal and State estimated Tax Payments.

Any other Official Tax Documents