

2023 - Things to Bring Check List
BE SURE TO BRING THE FOLLOWING WITH YOU

- ___ 1. All copies of W – 2, W-2P, 1099, 1098, Property Tax Bills and K-1 Forms.
(Including tax-exempt interest reported on 1099).
- ___ 2. All copies of Health **Insurance Coverage Verification Forms 1095-A/B/C**
(Required) for compliance with the Affordable Care Act – (employer, insurance co. or state exchange).
- ___ 3. **Completed Interview Questionnaire - 2023.**
(Please tell us what's new this year!)
- ___ 4. Documents for establishment, contributions and distributions for Health Savings
Accounts (**HSA**) (**Form 1099-SA**; etc.)
- ___ 5. **Completed** personal worksheets - income and deductions. **All 1099's you filed.**
- ___ 6. **2023 Escrow statements** (includes sales, new purchases and refinances)
- ___ 7. **Property tax bill** if purchased rental property. (For assessed tax values)
- ___ 8. **1099 Forms reporting all stock sales** for 2023, as well as purchase date and
cost basis information (**Form 8949**). Also provide records of all put and call activity.
Also include ALL CRYPTO wallet transactions. Any digital assets.
- ___ 9. **1099 Forms reporting unemployment compensation, state tax refunds,**
pensions and social security benefits received.
- ___ 10. **5498 Forms** reporting all **IRA** balances and accounts, including ROTH IRA'S.
- ___ 11. Social Security #'s and birth dates of all dependents (if not previously supplied)
(The IRS / FTB will reject the return if this information is not accurate).
- ___ 12. **2021 and 2022 tax returns** (new clients only).
- ___ 13. **All year-end mortgage loan statements, Forms 1098**, including those refinanced or
paid off during the year.
- ___ 14. **1099 Forms** reporting all **IRA's transferred or distributed, Roth IRA**
Contribution or Conversion
- ___ 15. Record of Federal and State **estimated tax payments** made.
- ___ 16. Name, address, phone and social security numbers of all **childcare providers.**
Required for childcare credit. Needed even if paid through a flex spending account.
- ___ 17. Any **IRS or Franchise Tax Board Correspondence** received during the year.
- ___ 18. All escrows and paperwork regarding any **foreclosure or short sale of real property.**
(Including all forms 1099-C, 1099-A, and CA F-3895)
- ___ 19. All tuition statements from higher education institutions (**Form 1098-T**).
- ___ 20. Signed Form 8332 for **dependents of non-custodial (physical) divorced parents.**
- ___ 21. Documents regarding all **stock options granted and exercised.**
- ___ 22. Any other documents you feel may be needed