

Documents needed for 2023 tax return preparation

<b>For new clients only</b>	<b>Provide these forms</b>	
Prior years' tax returns	Tax return for 2022 – <i>required</i>	<input type="checkbox"/>
	Tax returns for 2021 and 2020 – <i>recommended</i>	<input type="checkbox"/>
New client questionnaire, completed	<i>Required</i>	<input type="checkbox"/>
<b>Tax organizers</b>	<b>Provide these forms</b>	
Personal tax organizer, completed	Annual update page – <i>required</i>	<input type="checkbox"/>
	All other pages – <i>optional but highly recommended</i>	<input type="checkbox"/>
Business tax organizers, completed	<i>Required, unless we give you an exemption</i>	<input type="checkbox"/>
<b>Income</b>	<b>Provide these forms if you have them</b>	
Job – salary	W2	<input type="checkbox"/>
Business / Commissions / Contract jobs	1099-NEC / 1099-MISC	<input type="checkbox"/>
Unemployment	1099-G	<input type="checkbox"/>
Social Security	1099-SSA	<input type="checkbox"/>
Partnerships, S-Corporations, Trusts	K-1	<input type="checkbox"/>
Gambling winnings & prizes	W-2G	<input type="checkbox"/>
<b>Investments</b>	<b>Provide these forms if you have them</b>	
Banks & credit unions	1099-INT, 1099-OID, 1099-DIV – or “consolidated 1099 statement”	<input type="checkbox"/>
Mutual funds & stock brokerage accounts	1099-INT, 1099-OID, 1099-DIV, 1099-B – or “consolidated 1099 statement” Detailed annual statement or Gain/Loss report	<input type="checkbox"/>
IRAs, 401(k), 403(b), pensions etc.	1099-R only <i>No need for annual / quarterly statements!</i>	<input type="checkbox"/>
Oil & Gas / mineral rights	1099-MISC and/or K-1	<input type="checkbox"/>
<b>Real estate</b>	<b>Provide these forms if you have them</b>	
Mortgage	1098	<input type="checkbox"/>
Property purchased	HUD-1 statement / Closing Disclosure / contract	<input type="checkbox"/>
Property refinanced	HUD-1 statement / Closing Disclosure	<input type="checkbox"/>
Property sold	HUD-1 statement / Closing Disclosure / contract	<input type="checkbox"/>
Property foreclosed	1099-C or 1099-A	<input type="checkbox"/>
<b>Health insurance</b>	<b>Provide these forms if you have them</b>	
Health insurance premiums	1095-A, 1095-B, 1095-C	<input type="checkbox"/>
Health Savings Accounts (HSA)	1099-SA	<input type="checkbox"/>
<b>College education</b>	<b>Provide these forms if you have them</b>	
Tuition	1098-T	<input type="checkbox"/>
Money pulled out of College Saving Plan	1099-Q	<input type="checkbox"/>
Student loan interest	1098-E	<input type="checkbox"/>