

Taxes & More

423 F St, Ste 207 . Davis, CA 95616

530.902.8958 . dchristinekrieger@gmail.com

GENERAL TAX CHECKLIST Please check boxes for documents received

How Did You Hear About Us? \_

#### Are you interested in setting up a Tax Planning meeting regarding:

Marriage, College Funding, Home Purchase, Divorce, Retirement Career Change, Business Start-up & development, Rental Investments Retirement: Would you like information about ROTH IRA conversions

Are you interested in setting up a service plan for regular personal tax or business check-ins?

Would you like to receive a copy of your tax returns as:

PDF Only

Print Only

PDF and Partial Print (Signed 1040 & 540)

# Please check the right box for documents provided & items which apply to your situation

General Items to Bring to Tax Interview

**New Client** 

Prior year tax return (2022)

SSN and DOB for client, spouse and dependents

Please indicate whether your had moving expenses (Moving into CA)

Did you receive/were forgiven a PPP Loan in 2020 or 2021?

**New and Returning Client** 

DL # and expiration date for primary taxpayer and spouse

*IP-PIN Identity Protection number / letter - if any* 

SSN and DOB for new dependents (children) - by phone or via a secure portal only

**Records of estimated payments** 

Bank Information (for direct deposit)		
Bank Name		
Routing Number		
Account Number		

### INCOME

Please bring or upload to our secure platform IRS Letter 6475 regarding EIP/Stimulus Payment 2021, mailed out Jan 2022 ... IRS Letter 6419 - regarding ACTC/ Advanced Child Tax Credit, mailed out starting Dec 2021 W-2 for wages, W-2G for Gambling income Unreported Tips, Hobby Income 1099- INT, DIV, B - Interests, Dividends, Broker statement/Stock sales Information about Transactions in cryptocurrentcy 1099-G Unemployment or State Tax Refunds 1099 Royalties 1099-R, SSA - Retirement Income from: Pension/IRA, Social Security/Railroad Retirement 1099-K, 1099-NEC for SE Income Jury Duty, Alimony, Child Support Schedule K-1 - from Trust/Estate, Partnership, S-Corp 1099-S and Final Closing Statement for House purchase or sale 1099-LTC longerm care dispursement 1099-Q - 529 College Fund disbursement 1099-C for cancelled debt (Credit card, foreclosure, other debt)?

Did you receive, exercise, or sell stock options (ESPP, RSU, ISO, ...) . Did your employer issue Form 3922?

Did you receive, sell, exchange, or dispose of financial interest in virtual currency?

Earned Income of dependents or other adults in your home Un-earned income of dependents (E.g. interest, dividends, capital gains)

Did you have a distribution from a pension plan or IRA in 2020 AND deferred the tax payments Did you defer the tax payments for a 401(k), pension, IRA distribution in 2020 (due to COVID-19)

#### Business & Rental Income - see separate questionnaire/worksheet

Did you receive/were forgiven a PPP Loan in 2020 or 2021? Profit and Loss Statement from Small Business or Farm Profit and Loss Statement from or Rental Properties

### International - see separate questionnaire/worksheet

Foreign Income - all
Income received while on J, F or other US VISA
Gift/Inheritance exceeding \$100,000 from a foreign country (\$18,567 for 2023if from a corporation or partnership)

**OTHER INCOME - not mentioned above** 











## DEDUCTIONS ITEMIZED DEDUCTIONS

Medical Expenses - see below under HEALTH County Property Taxes Sales Tax paid on auto/boar purchases and capital improvements to home DMV Vehicle License fees Mortgage interest for loan up to 750K other mortgage interest Interest on Equity loan or line of credit used for home improvements Grandfathered in Mortgages (up to 1 Million) Charitable Contributions Cash/check Charitable Contributions non-cash/in-kind Miles driven for a charity Casulaty loss due to natural disaster Employee Business Expenses - Travel, Meals, Uniforms, Union fees, tools, dues, etc. Tax Preparation fees Investment expenses (Broker fee)

#### **MISCELLANEOUS**

ALIMONY Paid, ex-spouses SSN, date of divorce Traditional or other IRA contributions H'SA contributions ROTH IRA Contributions Form 5498 showing contributions to IRA

Educator / Class room expenses (incl face masks, sanitizer)

Information about household employee(s), nannies

Adoption Expenses

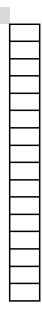
Taxes paid to Foreign Country - see separate worksheet Form 5498 showing contributions & RMD's to/from retirement plans and ROTH IRA conversions

#### **ENERGY & EV CREDITS**

Solar Other energy efficient improvements Electrical Vehicle

#### HEALTH including Dental, Vision, LT Care, Hearing Aids, etcetera

Form 1095 B or C, or other proof of health insurance Form 1095-A & CA FTB 3853 if you had COVERED CALIFORNIA 1099-SA - reports H'SA expenses Form 5498 - showing H'SA contribution Medical premiums (if after tax) Medical copays Prescription drugs, protective gear (Masks), some over the counter drugs Acupuncture, Physiotherapy, ... Nursing home fees Caregivers Miles driven for medical purposes (Doctor, pharmacy ....)





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## **EDUCATION**

Tution expenses University book expenses Please provide Form 1098-T Student Loan Interest - Form 1098-E Room & Board to offset 529 distributions

## **CHILDREN**

IRS Letter 6419 - regarding ACTC/ Adv Child Tax Credit, mailed out starting Dec 2021 Form 8332 - Waiver from Child's custodial parent (Divorced couples only)

Dependent Care Expenses (including name, address, EIN/SSN/ITIN, and PHONE of provider) e.g. pre-school, babysitter, after school care, summer Camps

## **CALIFORNIA RENTER**

Did you pay rent for at least 6 months last year

**OTHER DEDUCTIONS - not mentioned above** 

REMARKS





