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Taxes & More
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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

Please provide date & Dollar amount of payments	☐
Estimated payments applied from prior year	☐
Estimated payments to IRS	☐
Estimated payments to CA	☐
Estimated payments to other state	☐

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 ….)

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

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