

2022 INCOME TAX RETURN CHECK LIST

NEW FOR 2022

___ 1099-K – you may receive this form if you sold items through eBay or other online marketplaces

REQUIRED INFORMATION

For ALL clients:

___ Complete the Due Diligence Questions found on the INFORMATION page on our website

___ Driver's license for filer and spouse

___ Social security cards for new dependents

___ Six-digit Identity Protection PIN if sent to you by the IRS

For NEW clients (in addition to items listed above):

___ Social security cards for everyone listed on tax return

___ Copy of prior year tax return, and supporting documents

INCOME DOCUMENTS

___ W-2 forms from all employers

___ W-2G Gambling winnings

___ Social Security Statements

___ 1099-INT or 1099-DIV from interest, dividends

___ 1099-MISC, or 1099-B from stock sales along with basis information

___ 1099-R from retirement distributions (IRAs, 401(k) accts)

___ Rental income & expenses, mortgage statements if applicable

___ 1099-G Unemployment statements

___ Business income & expenses yearly totals, any equipment purchased (bill of sale and payments)

___ 1099-K showing sales per month through third party payment processor

HEALTH INSURANCE DOCUMENTATION

___ If you had health insurance for any month(s) in 2022 through the Marketplace/Affordable Care Act, please provide Form 1095-A.

PERSONAL, OTHER, ITEMIZED DEDUCTIONS – not all inclusive

Education expenses: tuition, books

___ 1098-T or 1098-E (if issued) OR statement showing tuition paid, receipts for books

___ Supplies receipts if you are a teacher

Child Care credit:

___ Statement from daycare with ID number, address, amount paid, child's name

Medical expenses: (total must exceed 7.5% of income for Federal--states vary)

___ Insurance premiums - medical, dental, long-term care – **paid with after tax dollars**

___ Doctor, dentist bills, co-pays

___ Prescriptions

- Medical devices such as glasses, hearing aids, etc.
- Mileage to and from appointments

Taxes:

- Real estate taxes – land, residences, rental property, etc.
- State income taxes – any paid separately
- Sales tax on high ticket items (cars, appliances, etc.) for states without income taxes
- State income taxes withheld (on W-2)
- State disability insurance (on W-2)
- Excise/Ad Valorem tax portion of vehicle, boat, trailer license/tag renewals

Interest:

- Home mortgage interest (Form 1098 from mortgage company)
- Interest on home equity loan (bank statement)
- Mortgage interest on vacation property (cabin, motor home, boat with sleeping & eating quarters)
- Mortgage interest on investment property
- Refinancing/home purchase documents – usually the settlement statement

Contributions:

- Cash/check payments to charities (must have statement for amounts)
- Goods donated to charities (must have statements listing items **and value** for donations)
 - cars donated are limited to \$500 unless the charity provides proof of a higher value when sold
- Mileage driven for volunteer work

OUR CONTACT INFORMATION:

WEBSITE

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