

## 2023 Client Tax Checklist

Please provide us with details on any of the following items that pertain to you for tax year 2023:

NOTES

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- If you have an HSA plan please provide forms 1099-SA and 5498-SA**
- Change of name w/ SSA (e.g. if recently married)
- Change of marital status
- Change of contact phone number(s)
- Change of mailing address
- Change in e-mail address
- Change of occupation
- Change of dependents
- Change of bank account for direct deposit of refund
- Cost of health insurance
- If you use your vehicle for business, please provide
  - Please provide mileage
    - Business
    - Personal
    - Commuting
    - Total
- If you sold stocks, bonds or mutual funds please provide year-end 1099s
- If you bought or sold real estate please provide a HUD-1 settlement sheet for each property
- If you paid or received alimony
- If you incurred qualified educator expenses (for teachers/administrators K-12 only)
- If you contributed to a traditional or Roth IRA please provide form 5498, if available
- If you contributed to a SEP or profit sharing plan
- If you paid student loan interest please provide form 1098-E
- If you contributed to a 529 education savings plan
- If you paid college tuition please provide form 1098-T or 1099-Q if 529 plan distribution
- If you have an HSA plan please provide forms 1099-SA and 5498-SA**
- Provide computation of the following deductions:
  - Medical exps (if greater than 7.5% of AGI)
  - Real estate taxes (if not on mtg. stmt.)
  - Mortgage interest (if not on mtg. stmt)
  - Charitable contributions (cash & non-cash)
  - Unreimbursed job related costs
- If you incurred costs for camp/childcare (we need the care-provider names, addresses and TINs as well as the cost breakdown by provider and by child)
- If you made energy saving improvements  
[https://www.energystar.gov/about/federal\\_tax\\_credits](https://www.energystar.gov/about/federal_tax_credits)
- If you paid federal and/or state estimated taxes, please provide breakdown of all payments made
  - 1<sup>st</sup> quarter (due by 4/15)
  - 2<sup>nd</sup> quarter (due by 6/15)
  - 3<sup>rd</sup> Quarter (due by 9/15)
  - 4<sup>th</sup> Quarter (due by 1/15)