

What to bring to your preparer...2023TY.

Please keep in mind, **not everything on this list will be needed** by every individual.
It is meant to serve as a helpful reminder of general guidelines.

General

- ☐ Driver's License ***required for BOTH spouses**
- ☐ Social Security Card(s) for NEW dependents only
- ☐ Last year's Federal AND State tax return (if not done at Griffin Accounting)
- ☐ IP-PIN *required if you were assigned # from IRS
- ☐ DIRECT DEPOSIT INFO
- ☐ Alimony paid OR received NEED SS# of payee (Divorce decrees prior to 12/31/2018)
- ☐ IRA Contribution
- ☐ 1095-A; Insurance/Marketplace statement
- ☐ December/January Heating bill (for home heating credit*)
*for LOW income families

Income


- ☐ W-2 wage statements
- ☐ W-2G Lottery or Gambling winnings
- ☐ 1099-R Pension or retirement income
- ☐ 1099-INT/1099-DIV Interest and Dividend Income
- ☐ Commissions paid OR received
- ☐ Record of Purchase & Sale of Residence & dates
- ☐ 1099-G state refund amount
- ☐ SSA-1099 Social Security income
- ☐ 1099-G Unemployment income
- ☐ 1099-B Information on sales of Stocks or Bonds
- ☐ 1099-C Cancellation of Debt

Expenses

- ☐ Estimated taxes paid
- ☐ Foreign taxes paid
- ☐ 1098-E Student Loan Interest
- ☐ 1098-T Tuition expenses
- ☐ Proof of Education Expenses (books, lab fees)
- ☐ Child Care expenses and provider information
- ☐ Property Tax Statements

If itemizing (for Schedule A)

Updated Standard Deductions (Single - \$13,850 / HoH - \$20,800 / MFJ - \$27,700)

- ☐ State and local sales taxes paid
- ☐ Lottery or Gambling losses
- ☐ Cash and noncash Charitable donations
- ☐ 1098 Mortgage/Home Equity loan Interest paid
- ☐ Real Estate and Personal Property taxes paid
- ☐ Casualty and Theft losses (FED DISASTER AREAS only)
- ☐ Medical, , & Dental (expenses over 7.5% of income)

For Businesses

- ☐ 1099-MISC/1099-K Self-employed business/Farm income & expenses
- ☐ Schedule K-1 Income from Partnerships, S-Corporations, Trusts, and Estates
- ☐ Business expenses (repairs, maintenance supplies, taxes/licenses)
- ☐ Home office expenses (utilities, repairs, internet, phone, etc., also need sq. ft. of Business Area)
- ☐ Income and Expenses from Rentals
- ☐ Business auto mileage (65.5 cents per mile)
- ☐ Business income
- ☐ Equipment purchased
- ☐ Job-related educational expenses
- ☐ Educator expenses
- ☐ RENTAL EXPENSES: taxes, mortgages, insurance and repairs
- ☐ FARM Income / EXPENSES



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