

2023 Tax Checklist

<u>Personal Data</u>	
<input type="checkbox"/>	All SS#'s
<input type="checkbox"/>	Date of Birth(s) of everyone on return
<input type="checkbox"/>	Updated contact info (if changed)

<u>Income</u>	
<input type="checkbox"/>	W2s
<input type="checkbox"/>	Unemployment Compensation
<input type="checkbox"/>	Misc Income 1099-Misc
<input type="checkbox"/>	Partnership, S-corp., Trust, K1's
<input type="checkbox"/>	Pensions and Annuities: 1099R
<input type="checkbox"/>	Social Security
<input type="checkbox"/>	Gambling Winnings

<u>Financial Assets</u>	
<input type="checkbox"/>	Interest & Dividends Statement(s)
<input type="checkbox"/>	Crypto transaction breakdown (sales)
<input type="checkbox"/>	1099 for your Brokerage Account

<u>Write-offs regardless of Itemizing</u>	
<input type="checkbox"/>	Educator Expenses
<input type="checkbox"/>	Student Loan Interest
<input type="checkbox"/>	Alimony Paid
<input type="checkbox"/>	Daycare EIN & Expense
<input type="checkbox"/>	Tuition, 1098T From University
<input type="checkbox"/>	HEALTH INSURANCE 1095A
<input type="checkbox"/>	Energy upgrades to the home
<input type="checkbox"/>	Electric vehicle purchase/hybrid

<u>Itemized Deductions</u>	
<input type="checkbox"/>	Medical Expenses
<input type="checkbox"/>	Mortgage Interest, Home Equity Line
<input type="checkbox"/>	Property Taxes
<input type="checkbox"/>	Charity

<u>Investment Properties</u>	
<input type="checkbox"/>	Rents Received
<input type="checkbox"/>	Repairs & Maintenance
<input type="checkbox"/>	HOA Fees
<input type="checkbox"/>	Mortgage Interest & Taxes
<input type="checkbox"/>	Insurance
<input type="checkbox"/>	Major Improvements (amount & date)
<input type="checkbox"/>	Hud Statement for New Purchase/Sale

<u>Most Overlooked</u>
Form 1095A Marketplace Insurance 1099 for stock trading account (non IRA) 1098T (On College website) Tuition expense Self employed: Health Insurance paid Checkbook: For Payment and Deposit info Socials for new dependents Health Savings Account (HSA) year end statement

<u>Estimated Payments Made to IRS</u>	
Date: _____	Amount: \$ _____
Date: _____	Amount: \$ _____
Date: _____	Amount: \$ _____
Date: _____	Amount: \$ _____

<u>Sending Documents over Email</u>	
<input type="checkbox"/>	Send 1 large attachment in 1 email
<input type="checkbox"/>	If you have many questions, please call.
<input type="checkbox"/>	Ask to confirm receipt of email

<u>Sending Documents via Fax</u>	
<input type="checkbox"/>	MUST send cover sheet with page totals
<input type="checkbox"/>	Include Phone # for us to confirm receipt
<input type="checkbox"/>	Our Fax: 772-419-8997

<u>Sending Documents via Mail</u>	
<input type="checkbox"/>	We encourage Fedex as it can be tracked
<input type="checkbox"/>	Keep copy for yourself
<input type="checkbox"/>	AdamPalas@gmail.com
<input type="checkbox"/>	Alexander.Palas@gmail.com
<input type="checkbox"/>	JKramserKing@gmail.com
<input type="checkbox"/>	BFTaxes.Ken@gmail.com (Ken Lundeen)
<input type="checkbox"/>	Tatum.e.helwig@gmail.com
<input type="checkbox"/>	PennyJoseph393@gmail.com
<input type="checkbox"/>	Devon.CampbellBF@gmail.com

<u>Dropping off Documents</u>	
<input type="checkbox"/>	Please use a large envelope
<input type="checkbox"/>	Please provide updated contact info

<u>New Stuart Location:</u>
119 SW 6th St Stuart, FL 34994 772-419-8998

Other Suggestions:

<input type="checkbox"/>	Gather ALL documents- Before arriving to your appointment. Bold items are commonly forgotten.
<input type="checkbox"/>	Bring your checkbook- Routing your refund and paying for our services will get you filed immediately.
<input type="checkbox"/>	No shoeboxes and sealed envelopes- Please open all of your envelopes and add up receipts.
<input type="checkbox"/>	Bring your Drivers License- You need a valid DL if you would like our fee to come out of the refund.
<input type="checkbox"/>	Arrive on time- Many of our appointments are back to back, so we kindly ask you to be on time.
<input type="checkbox"/>	New Clients- Please bring copy of your last tax filing.