

SKJ & Company, P.S.

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<http://www.skjcpa.com/>

Name of Business and/or Individual
Phone Number
Email

This form can also be completed & submitted online at:

<https://skjcpa.com/tax-documents-preparation-list/>

The following is a checklist for your 2023 income tax return documents. Please gather all tax documents and **forward them to us as a single package**. Or, your tax return may be filed with the IRS without important income or deduction items and may require filing an amended return.

- Check if there's **any change to your contact information** (Address or phone) and enter new info in #7
- Check if your bank info for tax refund/payment, please check and enter the new info in #7.

1. Income

Yes	No	Form Title	Description
<input type="checkbox"/>	<input type="checkbox"/>	Form W-2	Wage & Tax Statement
<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-MISC / 1099-NEC	Miscellaneous Income
<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-K	Merchant Card and Third-Party Network Payments
<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-R	Distributions from Pensions, Annuities, Retirements
<input type="checkbox"/>	<input type="checkbox"/>	Form W-2G	Certain Gambling Winnings
<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-INT	Interest Income
<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-DIV	Dividends and Distributions
<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-B	Proceeds from Broker and Barter Exchange Transactions
<input type="checkbox"/>	<input type="checkbox"/>	Form 1099-SSA	Social Security Benefit Statement
<input type="checkbox"/>	<input type="checkbox"/>	Schedule K-1	Shareholder's (Partner's) Share of income, Deductions
<input type="checkbox"/>	<input type="checkbox"/>	(N/A) → Please also attach statement of expenses for the rental activity.	Rental Income & Expenses

2. Deductions & Credit

Yes	No	Form Title	Description
<input type="checkbox"/>	<input type="checkbox"/>	Form 1098	Home Mortgage Interest Statement
<input type="checkbox"/>	<input type="checkbox"/>	Form 1098-T	Tuition Statement
<input type="checkbox"/>	<input type="checkbox"/>	Form 1098-E	Student Loan Interest
<input type="checkbox"/>	<input type="checkbox"/>	(N/A) → State business name and EIN of the child care service provider	Child Care Expenses
<input type="checkbox"/>	<input type="checkbox"/>	(N/A)	Property Tax Paid Information
<input type="checkbox"/>	<input type="checkbox"/>	(N/A) → Medical Expenses are deductible above 7.5% of your adjusted gross income.	Medical Expenses (Doctor, prescription medicine, etc.)
<input type="checkbox"/>	<input type="checkbox"/>	(Written letter issued by charity)	Charitable Contributions
<input type="checkbox"/>	<input type="checkbox"/>	(N/A)	Contribution to Individual Retirement Arrangement (IRA)
<input type="checkbox"/>	<input type="checkbox"/>	Electric Vehicle Purchase	Purchase contract with VIN, make, year & model.

[→ CONTINUED ON REVERSE SIDE]

3. Health Insurance Coverage

<input type="checkbox"/>	<input type="checkbox"/>	Form 1095-A	Health Coverage Purchased through State Health Benefit Exchange
<input type="checkbox"/>	<input type="checkbox"/>	Form 1095-B	Coverage Purchased Directly from Insurer / Small (<50 employees) Employer Coverage
<input type="checkbox"/>	<input type="checkbox"/>	Form 1095-C	Large (>50 Employees) Employer Coverage

IMPORTANT!! You are issued Form 1095-A unless you or your family had coverage through State Medicaid (Apple Health), employer-sponsored coverage (through payroll deduction), or healthcare ministry. If 1095-A information is not reported on the tax return, your insurance premium may increase drastically upon next renewal.

4. Other Information

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Did you purchase a new home last year?
<input type="checkbox"/>	<input type="checkbox"/>	Did you sell home last year?
<input type="checkbox"/>	<input type="checkbox"/>	Did you refinance your home mortgage last year? → If "YES" on any of the above, please attach the closing statement.
<input type="checkbox"/>	<input type="checkbox"/>	Did you make any major purchases, such as a car, RV or a boat? → If "YES," attach invoice/receipt where sales tax amount is stated.
<input type="checkbox"/>	<input type="checkbox"/>	Do you have a new born child? Are there any changes to your family status? → Please provide further details about the changes in your family status. → Please include name, birthday and SSN of the new born child.
<input type="checkbox"/>	<input type="checkbox"/>	During 2023, did you receive, sell, exchange, gift or dispose of a digital asset (such as virtual currency)? → Starting 2023, Form 1099-K is issued to any persons who traded virtual currency. → Please provide gain/loss report for your digital asset trading.

5. 2023 1040-ES Paid Information

Quarter	Date Paid	Amount
Q1		\$
Q2		\$
Q3		\$
Q4		\$

6. Foreign Financial Account & Assets (FBAR & FATCA Reporting)

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	During 2023, did you own any foreign financial assets subject to FBAR / FATCA reporting? → Please contact our office for the specific reporting requirements of FBAR and FATCA.

7. Miscellaneous

Please use the following space for any additional comments or concerns