***2023 TAX PREPARATION CHECKLIST***

**PERSONAL INFORMATION**

□ Your social security number (SSN)/tax ID number, date of birth, address, email, phone

□ Spouse’s full name, SSN/tax ID number & date of birth

□ Bank information for direct deposit of any refunds, bank name, checking/savings,

account number, routing number

**DEPENDENTS/HOUSEHOLD INFORMATION**

□ Full names, dates of birth & SSN/tax ID numbers of all qualifying family members

□ Childcare records including the provider’s tax ID number & address

**SOURCES OF INCOME**

**EMPLOYMENT**

□ Wage and Tax statement, *Form W-2*

**SELF-EMPLOYMENT**

□ *Forms 1099-NEC*, *1099-MISC*, or income records if no 1099s

**UNEMPLOYMENT**

□ Certain Government Payments, *Form 1099-G*

**RENTAL INCOME**

□ *Form 1099-MISC*, or income records if no 1099s

□ Farm rental income and expenses, *Form 4835*

**RETIREMENT INCOME**

□ Pension, IRA, Annuity income, *Form 1099-R*

□ Social Security benefits, *Form SSA 1099*

□ ROTH IRA conversion information

□ Traditional IRA basis (IRA contributions previously taxed, if applicable)

**SAVINGS & INVESTMENTS**

□ Interest or dividend income*, Forms 1099-INT, 1099-OID, 1099-DIV*

□ Income from sales of stock or property, *Forms 1099-B, 1099-S*

□ Health Savings Account distributions, *Form 1099-SA*

**OTHER INCOME AND LOSSES / ADJUSTMENTS**

□ Gambling income, *Form W-2G* (and losses up to total wins)

□ Jury duty records

□ Hobby income / expenses

□ Prizes and awards

□ Trust, Estate, Partnership income, *Schedule K-1*

□ Royalty income, *Form 1099-MISC*

□ Any other Forms 1099 received

□ Alimony paid/received, with ex-spouse’s name, SSN, divorce date*, if prior to 2019*

**DEDUCTIONS**

**HOME OWNERSHIP**

□ Mortgage interest statement, *Form 1098*

□ Real estate and personal property tax records

□ Receipts for energy-saving home improvements (*see below)*

**CHARITABLE DONATIONS**

□ Cash and non-cash amounts donated to charitable organizations

□ Record of charitable miles driven

**MEDICAL EXPENSES** (Only if itemizing. Subject to limitations.)

□ Amounts paid for healthcare insurance, outside of payroll deductions

□ Out of pocket healthcare expenses

□ Record of medical miles driven

**HEALTH INSURANCE**

□ If enrolled in an insurance plan through the Marketplace, *Form 1095-A*

□ Contributions to a Health Savings Account outside of payroll deductions, *Form 5498-SA*

**EDUCATIONAL EXPENSES**

□ Tuition statements, *Forms 1098-T*

□ Records of qualified educational expenses

□ Records of scholarships/fellowships /529 distributions

□ Student loan interest statement, *Form 1098-E*,

**TAX PAYMENTS**

□ Record of state/local income tax paid (if not shown on Form W-2)

□ Record of federal & state estimated tax payments

**NEW TAX CREDITS FOR 2023**

**RESIDENTIAL ENERGY CREDITS**

□ New credits for home improvements went into effect in 2023. If you installed a new furnace, A/C, boiler, heat pump, water heater, woodstove, windows, doors, insulation, solar or battery storage please provide a copy of the invoice. Improvements made to second homes now qualify for this credit.

**ELECTRIC/HYBRID VEHICLES**

□ If you purchased a new electric or hybrid vehicle in 2023, please provide the invoice.

**MINNESOTA ONLY**

□ Long Term Care Insurance premiums paid, company & account number

□ 529 Contributions, amount, company & account number

□ K-12 classroom supply expenses/homeschool supplies

□ K-12 private tuition

□ Income of other adults (not dependents) in your home, for MN property tax return

□ Renters credit *Form CRP*

□ Donation to MN Wildlife Fund

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