

TAX APPOINTMENT CHECKLIST

Just as a reminder, we cannot start your 2023 tax return without the following, if applicable:

- ☐ Signature(s) on the engagement letter along with all your 2023 tax information: There should be a Tax Engagement Letter included with your packet. If not, you can print a tax engagement letter from our website (located under Worksheets & Forms). Both spouses/partners must read, sign and date the engagement letter.
- ☐ Driver's license: If a joint return we will need a copy of both party's driver's licenses.
- ☐ Questionnaire - please complete (answer what you can, leave blank if cannot answer or unsure), sign and date the bottom of the last page.
- ☐ New dependent: We will need a copy of your new dependent's social security card and birth certificate.
- ☐ All dependents under the age of 17: We will need documentation such as school records, medical bills or any other document which shows your child's name, the address where the child lives and the parent(s) name claiming the child; some documentation might only note one of the parents name which is fine.
- ☐ If you want your refund directly deposited or balance due automatically withdrawn, we will need the Bank Verification Form signed by all parties noted on the return. If one was not included with your packet, you will find the Bank Verification Form on our website under Worksheets & Forms.
- ☐ Please remember to include your last YTD payroll stub(s) from each employer you had in 2023. Please be sure the last payroll stub is dated 2023.
- ☐ 401K year-end statements and other retirement statements.
- ☐ Did you sell anything, whether personal or from items you bought at a yard sale (this means anything), to anyone? Did you use the same platform, throughout the year, to sell the items and receive more than \$599.00 throughout the year? Did you use multiple platforms to sell these items and sold more than \$599.00 throughout the year from any platforms? If yes to the last two questions, we will need to see each 1099K you received from each platform. You will need to include the date you sold each item, a description of what was sold, how much you received from the sale, selling expenses, what you paid for each item you sold and the date you purchased each item you sold. If you sold multiple items, I would need this detail on each item sold.
- ☐ If you have a business and a business checklist is not attached, please call our office.
- ☐ If you purchased a rental property or started a business in 2023 and we are not aware of this, please call our office.
- ☐ If you have a business or rental property, just as a reminder 1099 form must be submitted to your vendors and IRS on or before 1/31/24.
- ☐ If you need Main Street to prepare your 1099 forms for you, your information is due in our office by January 8, 2024.
- ☐ Business owners, landlords and certain employees: Please do not forget to log your odometer 12/31/23. Also, if applicable, do not forget to value your inventory on 12/31/23 using the actual cost you paid.
- ☐ Health Insurance – If you purchased health insurance through the Marketplace you will receive a Form 1095A. This form should be available on or before January 31, 2024. Go online to www.healthcare.gov to retrieve this form.