



Client Name:

Date:

Year in Review: 2023

FORM NUMBER	FORM DESCRIPTION
W-2 or 1098-T	W-2 wages, Scholarships
1099-INT	Interest income
1099-DIV	Dividends
1099-B	Capital gains/losses
1099-G	Refund of prior year state income tax
	Alimony received
Schedule C	Business income/loss
1099-R	IRA/pension/annuity distributions
	Rental real estate
K-1's	Business income/loss
	Farm income
1099-G	Unemployment compensation
SSA	Social security benefits
1099-G	Gambling income
1099-C or Misc	Cancellation of debt income
	Educator expenses
1099-SA/5498-SA	Health savings account
	Moving expenses
	IRA/retirement plan contributions/ROTH conversion
1095-A	Health insurance premiums
	Alimony paid
1098-E or 1098-T	Student loan interest or Educational Expenses
	Tuition and fees
	Estimated tax payments
	Child and dependent care credit
	Education credits
	Residential energy credits
	Crypto-currency
	Foreign Assets
	Prior Year Return (applicable to new clients only)
ITEMIZED DEDUCTIONS	
	* Medical/dental/vision expenses
	* Taxes paid – state income, real estate, new vehicle
1098	* Home mortgage interest/points/mortgage ins prem
	* Personal property taxes
	* Charitable Contributions -Do you have Cash Receipts? IRS requires if audited
	* Cash Contributions - Do you have Cash Receipts? IRS requires if audited
1098-C	* Non-cash contributions
	* Unreimbursed employee expenses
	* Casualty/theft loss
	* Tax preparation fees
	* Gambling winnings/loss
	* Other expenses