

2023 Tax Season

# Document Checklist

- W-2 for wages
- W-2G for gambling
- 1099-Int for interest
- 1099-DIV for dividends
- 1099-B Brokerage
- SSA-1099 Social Security
- 1099-NEC for income and/or 1099-Misc for income
- 1099-K for income received from a digital payment platform
- 1099-R for retirement
- 1099-G for refunds & unemployment
- 1099-Int for mortgages
- 1098-T for tuition
- 1099-SA for HSA Contributions & Distributions
- K-1 forms from investments in S corporations or partnerships
- Form 5498 for IRA values
- IRA and Roth IRA contributions for 2023
- Childcare costs, and the name, address, amount, and ID # of the recipient
- Charitable donations-total amounts and recipients
- Property tax paid on your home, property, or cars
- Estimated tax payments and dates
- Any letters you received from the IRS or state tax authorities
- Our engagement letter, signed online
- IRS scrutiny of foreign accounts means that you need to be absolutely clear about any non-US accounts or income so that we report it correctly.