



Hinckley Tax Service

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2023 Tax Preparation Document Checklist/Organizer

- Dependents** – VALID documents to prove your child/other dependent lived with you during 2022 (valid docs = report cards, medical ins, med/dental bills, school bills, daycare bills, birth cert. for babies born in 2022, etc) DO NOT BRING magazine/flyer Address labels – not valid
- DIVORCED PARENTS** = If your child does not live with you or you have shared parenting – you MUST HAVE a VALID Form 8332 filled out for the correct tax year & HAND SIGNED BY THE CUSTODIAL/RESIDENTIAL PARENT!!!
- Social security card** for every dependent if I don't already have one on file for you
- 1095-A**, (If you purchase insurance thru marketplace, including OSCAR plans)
- W-2s**
- SSA-1099 (Social security statement)**
- 1099-int, 1099-DIV (or bank statement showing interest/dividends)**
- 1099-R (PENSION PAYMENTS, RETIREMENT INCOME OR IRA WITHDRAWALS/ROLLOVERS)**
- 1099-MISC, 1099-C, 1099-A** (Any statements from other income or cancelled debt)
- 1099-G from unemployment** (This most likely won't be mailed – you have to get it online yourself)
- 1099-B** (statements from selling stock or combined brokerage account statement)
- Brokerage statements (any/all info from your investments) including your form 5498
- 1098-E** (student loan payments)
- 1098-T or 1099-Q *IMPORTANT*** (tuition statements for college tuition for anyone in college or similar programs req'd for ed credits) IF YOUR 1098-T does not break down what you paid for – you must have some type of billing statement from the college to claim the credits.
- 1098** Mortgage statements
- Any Health Savings Account forms (**1099-SA & 5498-SA**) These are almost never mailed – get them in your online HSA account.
- Closing statements (HUD-1) if you bought/sold a house
- Receipts for anything due an energy credit (expanded now)
- K-1** from partnerships, estates or investments – PLEASE NOTE – MUST HAVE SEC 199-A INFO ON THE K-1 to claim the new business deduction.
- Medical expenses, dental expenses, eye expenses or other Alternative, but licensed Drs. (including out of pocket pharmacy & mileage to dr. appts, chiropractic, holistic & acupuncture) PLEASE BE SURE YOU KNOW HOW MUCH WAS PAID OUT OF ANY KIND OF Pre-taxed plan & how much was out of pocket.
- *IMPORTANT* All possible info for charitable deductions – THIS YEAR YOU MUST HAVE DOCUMENTATION FOR ANY amounts of donations (such as volunteer expenses, mileage logs & receipts for any donations over \$250). You need a **1098-C** for vehicle donation & YOU MUST HAVE some type of valuation method.
- Rental income/expenses records for any rental properties
- Contributions to State Education funds (529 plans) - the amount allowed is now \$4000 per person!
- Child/dependent care amounts paid for each child with **TAX ID# & address**
- Teachers (K-12 Licensed) – classroom expenses