Tax Year 2023: Income Tax Organizer

TAX N MORE SERVICES LLC

Check off those that apply to you and be sure to bring the corresponding documentation and information to your tax preparation appointment.

13545 Van Nuys Blvd Suite B21
Pacoima, CA 91331
818-270-8623

QUICK REFERENCE

Be sure you have the following applicable information upon arriving to your tax preparation appointment:

[Personal Info- Name, Date of Birth, Social Security Number of you and anyone on your tax return] [Income- All: W-2's, 1099's, K-1s] [Health Care- All: 1095 forms] [Credit & Deductions- All: 1098's, Form 5498]

Personal Information

___ **Client Intake & Quality Review Sheet** ***** Required to be filled before your appointment*****

___ Bank Account Number and Routing Number (When possible, bring a voided check)

___ Additional/New Dependent Name, Social Security Number, Date of Birth (additional documentation may be necessary).

___ IRS Issued ID Theft Personal Identification Number (PIN) Letter (necessary for those who were issued a PIN by the IRS, usually due to ID theft or related issues).

___ Individual Tax Identification Number (ITIN) for those who do not have a Social Security Number

Medical Health Care Coverage Information

___ Form **1095-A** Health Insurance Market Place Statement **(Covered CA. recipients)** This form **is necessary** if you were a recipient of **Affordable Care Act** coverage.

___ Form **1099-SA** Distributions from a Health Savings Account (HSA)

___ Proof of Health Insurance Coverage (medical card or health insurance statement).

Tax Credits and Deduction Checklist

****HOMEOWNERS **** Maximize the tax benefits of homeownership. Be sure to have all the following information.

___ **1098** Mortgage Interest Statement(s)*note if your mortgage servicer changed hands bring 1098 from each provider.

___ **December 2023 Mortgage Statement**

___ **Purchased Home in 2023 – 1**. Final Closing Disclosure **– 2. ALL** 1098 Mortgage Statements (multiple may have been issued as the loan may have changed hands a few times in the first year) **3.** Monthly Mortgage Statement

___ **Real Estate Taxes Paid –** December 2023 Mortgage Statement and/or county property tax statement

___ **Solar Panels - Residential Clean Energy Credit**: Total contract/invoice cost for solar panels installed in 2023

****Child/Qualified Dependent Credits****

___ **Earned Income Tax Credit (EIC)** - AND - **Child Tax Credit (CTC)**: bring 2 of the following - *School Records, Health Care Provider Statement, Medical Record, SS Card, Birth Certificate, proof of custody*

___ **Childcare Credit**: Childcare providers Address, I.D. Number and Amounts Paid

****Other Credits and Deductions****

___ **Education Credit** - Form **1098-T** Tuition Statement: provide us with details relating to all educational expenses

___ Form **1098-E** Student Loan Interest

___ IRA Contributions Deduction: **Form 5498**

___ **Qualified Plug-in Electric Drive Motor Vehicle Credit:** Please provide- Purchase date, year make & model, VIN

___ Charitable Contributions (gifted items to charity and monetary donations)

___ DMV Registrations

___ Medical and Dental Expenses Paid

___ Gambling Losses - Casino win/loss statement

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General Income

___ **W-2** Form(s) for Wages, Salaries, and Tips (You need a W2 for each job worked in 2023)
___ Form **1099-INT & 1099-OID** Interest Income Statements
___ Form **1099-DIV** Dividend Income Statements
___ Form **1099-B** Sales of Stock, Land, etc.
___ Form **1099-G** State Tax Refund (only if you itemized using Schedule A in the previous year)
___ Form **1099-G** Unemployment Compensation Received from EDD and/or Taxable Paid Family Leave
___ Form **1099-NEC Nonemployee Compensation** AND/OR ___ **1099-Misc** Miscellaneous Income
___ Form **1099-C** Cancellation of Debt income
___ **W-2G** Certain Gambling Winnings
___ Form **1099-R** Retirement Income or Distribution from Retirements Account (401K,IRA)
___ Social Security and Railroad Retirement Income
___ Form **SSA-1099** Social Security benefits received

Other Income Requiring Special Processing and Additional Details

___ **Real Estate Rental Income and Expenses**

- Please provide us with an **END OF YEAR** statement that details and summarizes your income and expenses.
- Bring in any **1099-Misc** showing Rental Income received.
- Bring in all **1098-Forms** containing Mortgage Interest paid for each property.
- Bring a monthly mortgage statement - info on real estate taxes - and insurance payments.

___ **Form K-1** Income from Partnerships, Trusts, and S-Corporations

___ **Sale of Real Estate (Home or Rental Property)**

- Form **1099-S** Proceeds from a Real Estate Transaction
- Final Closing Settlement Statement (for purchase and sale of property)
- Please provide us with dates of original purchase and sale of property

___ **Foreclosure, Short sale, Abandonment of Property Income**

- Please provide a Cancellation of Debt Form: **1099-C** and/or an Acquisition or Abandonment of a Secured Property Form: **1099-A**
- Final Closing Settlement Statement (for purchase and sale of property)

Business: Self-Employed, Sole-Proprietor, Partnership, LLC, S-Corp, C-Corp

******Upon booking your appointment please request a BUSINESS Income Tax Organizer******

___ **End of Year Summary of Business Income and Expenses:**

- Please provide us with an **END OF YEAR** Statement such as a Profit and Loss, Income Statement, or DTCo's Business Income Tax Organizer that summarizes your total annual income and expenses.

***Additional charges for End of Year Bookkeeping apply If calculating and categorizing is done by your tax preparer*

___ **1099-NEC** forms containing reportable income received.
___ **1099-K** for credit card transaction payment you received through merchant services
___ Payments made to vendors and independent contractors
___ Documentation of business miles driven
___ Business Employee Identification Number (EIN) and State Entity Number
___ Articles of Incorporation (Corporations) OR Articles of Organization (LLC) and State File Number
___ Business use of home information: Sqft of area used for business and sqft of total area of home
___ Asset Information for Calculation Depreciation: Purchase date, purchase amount, and date placed in service