

Peachtree Financial

Accounting & Tax Professionals

Tax Year 2023

Please use the below information and subsequent questionnaire as a guide for the items that we will need to serve you.

You will need to provide the following information that applies to your unique tax situation:

- **A complete copy of your prior year income tax return, if not prepared by our office. Please be sure to include asset depreciation schedules for rental and business assets.**
- Forms W-2 for wages, salaries and tips.
- All Forms 1099's for interest, dividends, retirement, miscellaneous income, unemployment compensation, nonemployee compensation, Social Security, state or local refunds, gambling winnings, etc. (these include 1099-NEC, 1099-MISC, 1099-R, 1099-K, 1099-DIV, 1099-INT, W-2G, SSA-1099, 1099-G, 1099-C)
- Brokerage statements (Year-End Tax Brokerage Statement- includes the Form 1099-B/1099-DIV) showing investment transactions for stocks, bonds, virtual currencies, etc.
- Schedule K-1 showing income from Partnerships, S Corporations, Estates and Trusts.
- Statements and receipts supporting qualified educational expenses, deductions or distributions, including any Forms 1098-T, 1098-E, or 1099-Q.
- All Forms 1095-A, 1095-B, and/or 1095-C related to health care coverage or the Premium Tax Credit.
- All Forms 5498-SA For Health Savings Account Contributions
- All Forms 1099-SA For Health Savings Account Distributions
- Statements supporting deductions for mortgage interest (Forms 1098), taxes, and charitable contributions (including any Form 1098-C).
- Copies of closing statements regarding the sale or purchase of real property.
- Legal papers for adoption, divorce, or separation involving custody of your dependent children.
- Six-digit Identity Protection PIN if sent to you by the IRS.
- Any tax notices sent to you by the IRS or other taxing authority.