

## Which documents do I need to upload to TaxDome?

Here is a list of common documents needed to prepare your tax return. Not all these document types will apply to your situation. If in doubt, please upload it for my review. Some documents such as 1099-B from brokerage firms or Schedules K-1 may not be available until later in the season. Thank you!

You can upload documents in [TaxDome](#) within the Tax Organizer or under the Documents section.

### SOURCES OF INCOME

#### Wages

- W2 - Wages paid by employers
- Tip Income not reported to employer

#### Investment Income

- 1099-INT - Interest income
- 1099-DIV - Dividend income
- 1099-B - Income from sales of stocks, bonds, or mutual funds
- 1099-SA - Health Savings Account (HSA) distributions
- Closing disclosure for any property purchase or sale

#### Retirement Income

- 1099-R - Pension/annuity/IRA/401k distributions
- SSA-1099 - Social Security income

#### Other Income

- 1099-G - Unemployment income
- 1099-G - State tax refund from a prior year
- 1099-NEC - Non-employee compensation
- 1099-MISC - Royalty income and other income
- 1099-K - Payment Card/3rd-Party Network Trans
- 1099-C - Cancellation of Debt
- W-2 G - Gambling Winnings
- Schedule K-1 - Income/loss from a partnership, S-corp, trust, or publicly traded partnership (PTP)
- Digital Assets - Transaction data for digital asset and virtual currency sales and exchanges

### OTHER ITEMS

#### Estimated Tax Payments

- Provide dates and amounts paid to IRS/state

#### Health Insurance Subsidy

- 1095-A - Health insurance statement from the Marketplace (e.g., Healthcare.gov/Obamacare)

#### IRS Identity Protection PIN (IP PIN)

- Letter CP01A - Six-digit Identity Protection PIN

#### Home Energy Improvements

- Receipts for the purchase and installation of solar electric, water heater, doors, windows, insulation, heat pump, central A/C, or furnace

#### Clean Vehicle Purchase

- Bill of sale for qualified plug-in electric vehicle

### CHILDREN & DEPENDENTS

- Copy of Social Security card for new dependents
- Expenses for child and dependent care

### EDUCATION

- 1098-T - Tuition paid to educational institutions
- 1098-E - Student loan interest paid
- Educational expenses and scholarships received

### RETIREMENT

- IRA/HSA - Amount contributed (or plan to contribute by 4/15) to an IRA or HSA
- Form 5498/5498-SA – IRA and HSA contribution information for prior year

To file a timely return by April 15, your Tax Organizer and tax forms must be submitted to me by March 15. If you're not ready to file, I can submit an extension on your behalf for an additional \$50 fee.



## STANDARD VS ITEMIZED DEDUCTIONS

### Standard Deduction

Filing Status	2023
Single	13,850
If over 65	15,700
Married Filing Jointly	27,700
If one spouse over 65	29,200
If both spouses over 65	30,700
Married Filing Separately	13,850
Head of Household	20,800

If you think your total itemized deductions will exceed your standard deduction, please provide:

### Home Ownership

- Receipts for property taxes paid
- Mortgage interest statements (Form 1098)

### Charitable Contributions

- Receipts for cash amounts donated to charitable organizations (political contrib not deductible)
- Receipts for non-cash charitable donations
- Miles driven for charitable purposes

### Medical Expenses *(subject to threshold of 7.5% of Adjusted Gross Income (AGI))*

- Amounts paid for health, dental, vision, supplemental, and long-term care insurance and for doctors, dentists, hospitals, prescriptions, and medical devices
- Miles driven for medical purposes

### State & Local Taxes

- Personal property taxes paid (ad valorem taxes for vehicles (this doesn't apply in FL))
- Invoice showing amount of sales tax paid on a vehicle, boat, or plane

### ALIMONY PAID OR RECEIVED

- Amount paid or received (include ex-spouse name and SSN, date of dissolution)

### SELF-EMPLOYED (*Sole prop./single member LLC*)

- Profit & Loss Statement, or list of business income and categorized expenses
- Details on purchases of furniture, equipment, or machinery items over \$2,500
- Business vehicle expenses and mileage
- Home office expenses
- Forms 1099-K, 1099-NEC, or 1099-MISC

### RENTAL PROPERTY OWNER

- Profit & Loss Statement, or list of business income and categorized expenses
- Property improvements and purchases of furniture or equipment items over \$2,500
- Forms 1099-K, 1099-NEC, or 1099-MISC

### BUSINESS RETURNS. (*S-corp, C-corp, or Partnership*)

- Profit & Loss Statement and Balance Sheet with prior year comparison, or access to your accounting software
- Details on purchases of furniture, equipment, or machinery items over \$2,500
- Business vehicle expenses and mileage
- Home office expenses
- Forms 1099-K, 1099-NEC, or 1099-MISC
- Shareholder/Partner names, SSNs, addresses, ownership percentages, basis, contributions, distributions, and loan amounts
- Officer names, titles, and salaries/guaranteed payments to partners
- Payroll reports/quarterly payroll tax returns

### Business Tax Return Filing Deadlines

March 15	S-corp & Partnership
April 15	C-corp

**Due to the tight turnaround time, I generally file extensions for all business tax returns.**

