

2023 CHECKLIST FOR ACCURATAX LLC

****NEW CLIENTS - PLEASE PROVIDE COPY OF 2022 TAX RETURN****

Tax Payer _____ DOB _____ Social Security No. _____

Spouse _____ DOB _____ Social Security No. _____

Address _____ City _____ Zip _____

Phone _____ Email _____

Other/Spouse Email _____

(If we have bank info from last year - just need last 4 of acct _____
(Direct Deposit Info)

Bank Name _____ Routing No. _____ Account _____

1) Do you want a Ecopy or Hard Copy of your tax return?

Ecopy _____ Hard Copy _____

2) During 2023, did you receive a reward, award, payment or sell, exchange, gift or dispose of a digital asset? No Yes

3) Do you have foreign accounts No Yes

If Yes is total of all foreign accts more than \$10,000? No Yes

4) Did you sell or buy a house in 2023? No Yes

5) Did you receive any correspondence from the IRS in 2023? No Yes

Income and Deductions

_____ W2 Forms (Wages)

_____ 1099_NEC (Contract Work)

_____ 1099_MISC (Other Income)

_____ 1099-INT or December Bank Statement (Banking Interest)

_____ Unemployment (Form 1099-G)

_____ Retirement Benefits (1099-R)

_____ Social Security Benefits

_____ Alimony Received

_____ HSA Contributions and Distributions 2023

_____ Daycare expenses

_____ College Education loan interest

_____ College Education expenses (1098T/Books/Materials)

_____ Educators Credit (Limit of \$300 school supplies)

IF YOU ITEMIZE (MFJ \$27,700, Single \$13,850, Household \$20,800)

_____ 1098 (House Interest)

_____ Property taxes (2022 taxes paid in 2023)

_____ New Vehicle Purchase in 2023 (Please supply sale receipt)

_____ Cash contributions paid to Non-Profits

_____ Gift contributions given to Non-Profits

_____ Medical Expenses Out of Pocket NOTE: CANNOT BE FUNDS HSA PAID

_____ Medical Premiums (W2 Employee can't deduct company insurane)

_____ Long Term Care Payments

_____ Last Years State Refund Card

Office Use Only

Portal _____

Office Delivery _____

STOCK, MUTUAL FUNDS, or IRA's

1099-B sold mutual funds or stock (Need Sell & Buy amounts)

1099-DIV if you receive dividends from Mutual Funds or Stock

IRA Contributions for 2023 (Don't need Roth Information)

RENTAL PROPERTY:

Need Report with Income, Mortgage Interest, Property Taxes, Property Insurance, and all other property Expenses.

(There is a Worksheet on the AccuraTax Website)

NOTES:

THIS SECTION FOR CLIENTS WITH DEPENDENT CHILDREN

ONLY NEED NEW CLIENTS CHILDREN LISTED OR NEW CHILDREN BORN IN 2023.

Name _____ Social _____ DOB _____
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- 1) Is your dependent unmarried? Yes No
- 2) Could another person qualify to claim your child? Yes No
- 3) Is your dependent a citizen of the United States? Yes No
- 4) Did the child live with you over ½ of the year? Yes No
- 5) Have you ever been disallowed any child tax credits? Yes No
- 6) Please provide on piece of documentation that helps support the child as a dependent?
(Medical Record, School Record, Childcare Provider Records, Social Services Statement, Employer Statement)
- 7) Do the answers to the above questions apply to all your dependents? Yes No

Other Optional Questions:

- 1) If this child isn't your child, why is the parent not claiming the child?

Notes: _____

Dependent became 17 in 2023 or is older

- 1) Is dependent in High School or College? Yes No
- 2) If no, did dependent earn more than \$4700?

NOTES:

