Client Name:

2023 Universal Tax Record Checklist

Miller Block Building
165 5th St SE
Pine City, MN 55063
Tel (320) 629-4745
Fax (516) 941-0225
email todd@toddstaxservice.com
Cell (612) 242-5713 texts ok.

	Do you have?
___	Roth IRA
___	529 Plan Educa
___	401K or other retire plan
___	HSA
___	U.S. Savings Bonds

Please bring the following items to your appointment:

__Please bring in a copy of your 2022 tax return and a photo ID if you are a new client.
___W-2 Forms. Bring final paystub too - it contains info not always on your W-2.
___1099 Forms. (These could be 1099-R, 1099-MISC, 1099-S, 1099-Int)
___Certificate of Rent Paid if you rent your home.
___Property Tax Statement (most recent) if you own your home.
___Do you or your spouse have an IPIN? (IRS issued ID Theft Pin #)

	YES	NO
Has your marital status changed since 12/31/2022?		
Are there **new dependents** in your household since 12/31/22?*		
Have you received any correspondence re your 2022 taxes?		
Do you need advice on any special issues now or in 2024?		
Do you have a bank (checking or savings account)?		
Did you sell a home in 2023?		
Are you still waiting for certain tax documents to come?		
Have you filed for bankruptcy or had debt cancelled in 2023?		
Do you have health insurance?		
Did you receive any nontaxable income?		

___MFIP ___Work Comp _____Other < Check all that apply.

* Bring a social security card and birth certificate for any NEW dependents on your return.
New clients should bring both (SS card and birth Cert) for all children on the EIC form)

Contact Info :

Taxpayer:	DOB	SSN
Spouse:	DOB	SSN

Address: _____

_____

Home Telephone: _____
Cell Phone: (Text Y or N) _____
Email taxpayer: _____
Email spouse: _____

New Dependents:

Name	SSN	DOB

State Income Tax -Did you live or work in another state other than your home state? Y___ N____

Dates of Residence:	ST # 1		ST #2	
Spouse Date if diff:	ST # 1		ST #2	

Delivery Preference: Sitdown ___ Online ___ US Mail ___ Pickup at Front Desk___ Pickup out front in car___

INCOME CHECKLIST

		IRS Form
	Wages	W-2
	Unemployment	1099-G
	Interest	1099-INT
	Gambling	W-2G
	Self Employment	1099-MISC
	IRA/ 401K Distribution	1099-R
	Pension	1099-R
	Social Security	1099-SA
	Investment Act	1099
	Crypto Account	1099
	"Gig" Economy	1099
	Sale of Real Estate	1099
	K-1 Estate, Trust, S Corp, Partr	
	Rental Income	
	Other - please specify:	
	Foreign Accounts?	
	Open IRS Issues?	
	HSA Distribution (Form 1099SA)	
	Form 1095-A from Health Exchange	
	Forms 1095 -A,B or C (Health)	

Date of initial client submission of info to Todd:___-___-___

Daycare Info:
Name of Provider:_____
Address of Provider:_____
Fed Tax ID of Provider:___-_____
Amount Paid:_____ Care for: _____/_____

Tuition Information:
We need 1098-T AND cancelled checks!
Name of College Student:_____
Name of College_____

Out of Pocket Costs - list:		
Tuition and Fees		
Books (Required)		
Grants / Scholarships?		

Name of College Student:_____
Name of College_____

Out of Pocket Costs - list:		
Tuition and Fees		
Books (Required)		
Grants / Scholarships?		

Mileage:	Car #1	Car #2
Description of Vehicle:		
Gross (Total) Mileage for YR		
Commuting Miles (not ded)		
Work related miles not DEDUCTIBLE		
Charity Miles		
Medical Miles		

You must have written records (log) to take a deduction.
Mileage to and from home and work is not deductible.

	2022	2022	**2023**
Mileage Rates	01/01-05/31	6/30-12/31	
Business Use	56¢	58½¢-62½	65¢
Medical	16¢	18-22¢	22¢
Charitable	14¢	14¢	14¢
Moving	16¢	18-22¢	22¢

Deductions/ Credits Detail

I have received a copy of this checklist:
Taxpayer Initials___ Spouse Initials___ Date:

DEDUCTION /CREDIT CHECKLIST

Medical Bills	
Mortgage Interest	
Property Taxes	
Contributions	
Work Related Expenses	No longer deductible
Tuition	
Casualty/Theft Loss (Fire, Flood)	
Daycare expenses	
Student Loan Interest	
Auto Tax (Tabs)	
State:	
Minnesota K-12 School	
Wisconsin Rent/Prop Tax Paid	
WI Rent - Heat Paid? _____	
Long Term Care Ins Premiums Paid	

	Total Fee
Car # 1 Tabs (License Plates)	
Car # 2 Tabs (License Plates)	
Car #3 Tabs (License Plates)	

The personal property tax is deductible and is the amount over $52.

Boat, Snow Mobile, RV, Trlr - NOT DED

State Balance Due Paid for 2022	
State Balance Due other years	

Interest on back taxes is not deductible.
Did you buy a new car, boat or RV?
Real Estate Tax Paid

Home	
Cabin/Second Home	
Land	

Penalties and late payment interest not deductible.

Sales Tax on new car or truck: [ ]
Use higher of income tax or sales tax.

Contributions:	
Cash - list	
Clothing - goods li	
Cannot exceed $500 without detail.	

Minnesota allows a subtraction for contributions over $500 even if you don't itemize your deductions on Federal.

Office in home
Must use office area exclusiv for business. Ask for info.

Minnesota Non Game Wildlife Designation: YES____ NO____
US Presidential Election Fund YES___ NO___
Minnesota Political Party: R___ D_____ G_____ I_____

Please attach a voided check for direct deposit or direct debit.

Energy Credit:
Home (Solar, Insulation, HiEff Furnace, Geothermal)
New or Used Electric Car

Retiree Tax Planning Questions:

	Y or N
Do you have a will? Updated:	
Do you have IRA accounts?	
Do you have more than $100,000 in IRAs?	
Do you have a ROTH IRA?	
Do you have Long Term Care Insurance?	
Do you own land?	
Have you filed a "Transfer on Death" Deed?	
Have you made gifts in excess of $17,000 per person?	
Do you have more than $10,000 in savings bonds?	

K-12 Expenses

Name:			
Grade:			
Supplies			
Music Lessons			
Musical Instrument			
Computer Purchase			
Tuition/Tutoring			
Transportation Paid			

Do not include:
internet fees, school lunches, clothing optional items.
You must have receipts for school items.

2023 Standard Deduction

Single	13,850	+65	1850
Head of Household	20,800	+65	1850
Married Filing Joint	27,700	+65	1500
(Higher for 65+)		+65	

Todd's Tax