

## **Please remember to bring:**

**\*\*\*New Clients:** Please bring in photo identification, social security number and banking information (for ACH refunds or payments) \*\*\*

\_\_\_\_\_ W-2's, 1099-DIV & INT, 1099-R, SSA-1099's  
1099-G (unemployment & state tax refunds)

\_\_\_\_\_ Partnership, S corp. & trust income: Schedule K-1

\_\_\_\_\_ Childcare information: Amount paid recipient, address, and SSN/Fed. ID

\_\_\_\_\_ Social security numbers and birth dates of newborn children or new dependents

\_\_\_\_\_ Purchase and sale papers for former residence and purchase papers for home/rental properties refinance papers for residence or other property

\_\_\_\_\_ Alimony amount paid or received and recipient's name & social security number

\_\_\_\_\_ IRA contributions for 2023

\_\_\_\_\_ If schedule A itemizing:

- All medical expenses including insurance premiums paid by you, co-pays, and mileage
- Taxes (excise, income, real estate, personal property, and foreign)
- Sales Tax - receipts that show sales tax paid in 2023, especially on large purchases
- Interest expense (home secured interest and investment interest) – Form 1098
- Charitable (cash, non-cash and volunteer mileage)

\_\_\_\_\_ Stock buy and sell slips (need dates & cost), this includes digital or crypto currency

\_\_\_\_\_ Rental income and expenses including mileage

\_\_\_\_\_ Business income and expenses including detail on new equipment purchased in 2023

\_\_\_\_\_ Any extra income: prizes, awards, strike benefits, jury duty

\_\_\_\_\_ Tuition cost for any college or post-secondary education as well as, totals of any scholarships or grants

Remember to read your odometer on **12/31/23**

To save time, Accu-Tax Services prefers to have totals for any expense or deduction figures you bring in.