

WAGE AND TAX STATEMENTS

- Provide all tax statements received including **W-2, W-2G, 1099-R, 1099-INT, & K-1** forms, IRS Letter 6419, IRS Letter 6475, etc.
- Mortgage & Home Equity Interest** Paid, include Form **1098**. *Note information needed as listed in cover letter.
- Real Estate Taxes (property & school)** Paid in 2023, even if you did not itemize in prior years. List dates and amounts paid.
- Include all **1099-B & 1099-Div** Statements and your **Year end Summary** from Stockbrokers. For stock sales please provide exact dates and amount paid for stock when acquired, including commissions paid.
- Social Security, Unemployment and Disability Benefits** received. Include Form **1099-SSA, 1099-G, etc..**

OTHER DEDUCTIONS

- Cash Contributions.** Must have bank records under \$250 & written acknowledgment from the charitable organization if over \$250.
- Noncash Contributions.** Over \$500 Provide written receipt with Name, Address of Organization, Date, & Value.
- Medical, Dental and Eye Expenses** Paid, including laser eye surgery, unreimbursed amts you paid to participate in a program to stop smoking or for prescription medication to alleviate nicotine withdrawal. Do not include nonprescription medications.
- Miscellaneous Unreimbursed Employment Related Expenses** (Federal and NYS deduction allowed if you are a member of the Armed Forces, qualified performing artist or government official paid on a fee basis, all others NYS deduction only) (i.e. Safety Clothes, Tools, Parking Fees, Tolls, Uniforms, Vehicle Expenses, Lodging, Telephone, Meals, Total Miles, Business Miles, Leased Vehicle; mo. pmt. & # of pmts. pd., type of vehicle, Ins. amt. pd.). Please provide us this information in writing.
- Health Ins. Premiums** (Do not include pre-tax withholdings from your paycheck). **Long Term Care Insurance** paid by you.
- Purchased Health Ins. For yourself or a family member through the Health Insurance Marketplace (Exchange).** Attach Form 1095-A, Health Insurance Marketplace Statement. Did you receive an advance premium for health insurance?
- Are you a teacher/school professional** and paid for books, supplies, equip. and supp. material used in a classroom or amounts paid for a professional development course related to curriculum or to the students taught. List amounts paid.
- Education Exps**-(Include form 1098-E, 1098-T, 1099-Q), for you, your spouse or your dependents. Provide printout of student account from higher education institute listing dates of payments and charges incurred.
- List **Job Search Costs, Safe Deposit Box Fee Paid, Union Dues, Professional Subscriptions.**
- List **Adoption Expenses** paid by date and indicate the following: age of child & status of adoption (i.e. final).
- Contribute to **HSA** for 2023? List amount of contributions paid in: Self \$_____ Spouse \$_____ Do not list Employer contributions or amounts you elected to contribute under a cafeteria plan, shown on your W-2. **Type of Coverage:** Self Family Amount of Qualified Unreimbursed. Medical Expenses paid \$ _____.
- Moving Expenses** - Available for members of the Armed Forces, on active duty and due to a military order. List Expenses paid out.
- Student Loan Interest** Paid in 2023 for yourself, your spouse, or your dependents.

OTHER INFORMATION

- Indicate **Marital Status** as of December 31, if changed from last year (i.e. Single, Married, Legally Separated, Divorced), also indicate if you lived apart from your spouse during the year.
- Amount of **out of state purchases**, which you took delivery in NYS through the Internet, by catalog, television shopping channels or on an Indian reservation and NYS Sales tax has not been paid on these purchases.
- IRA**- Did you contribute for 2023 contribution or do you plan to contribute before 4/15/2024? Traditional Amount \$ _____
Note Distributions, Rollover or Conversions, List type and amount. Roth Amount \$ _____
- Retirement Contributions/Distributions** - SEP, SEP-IRA, SIMPLE IRA or Qualified Retirement Plan.
- Contribute to a **NYS 529 account** in 2023? If so, please give the total amount contributed for each beneficiary.
- Alimony** Paid or Received, include name and Social Security Number. Date of original divorce or separation agreement _____.
- Note if you had any **Debts** canceled or reduced (incl. credit cards), property repossessed or foreclosed upon, file for bankruptcy.
- Purchase of a **Qualified Fuel Cell Vehicle, or Plug-in Electric or Hybrid Vehicle** in 2023, include invoice showing vin, year, make, model, & date purchased.
- List amount & type of Energy Efficient Property added to your main home or second home in 2023. This refers to **Exterior Windows and Doors, Skylights, Insulation, Hot Water Heaters, Central Heating and Air Conditioning Units, Roofs (Metal and Asphalt), Biomass Stoves, Solar Electric Property, Solar Water Heating Property, Fuel Cell Property, Small Wind Energy Property, & Geothermal Heat Pump Property.** Lifetime limits and Energy standards do apply. Note which home.
- Sales Tax** pd in 2023 on the purch. of a **Car, Motorcycle, Boat, Motor home, Recreational Veh., Sport Utility Veh., Trucks, Vans & Off-Rd Veh..** Need **date of purch. & purch. price before sales tax.** Also incl. sales tax pd for a Leased Veh.

SELF-EMPLOYED-BUSINESS INCOME AND EXPENSES		RENTAL INCOME AND EXPENSES Use additional copies for multiple properties	
Name of Business _____ Activity _____		Property Address _____ <input type="checkbox"/> Single family residence <input type="checkbox"/> Vacation or short-term rental <input type="checkbox"/> Multifamily residence <input type="checkbox"/> Commercial rental <input type="checkbox"/> Land	
Gross Income Collected \$ _____ Indicate if the amount includes 1099's received, or sales tax collected. Amount of sales tax included \$ _____.		Rents Received \$ _____ List Security Deposits separately. Indicate if incl. 1099 rec.'d No. Days Rented _____ No. of personal use days _____	
Self-Employed Expenses	Amount	Rental Expenses	Amount
Advertising		Advertising	
Automobile		Automobile	
Dues and Subscriptions		Dues and Subscriptions	
Bank Charges		Bank Charges	
Insurance (other than health)		Insurance	
Employee Health Insurance		Cleaning and Maintenance	
Professional Fees		Professional Fees	
Interest Expense		Mortgage Interest Paid	
Telephone		Telephone	
Repairs and Maintenance		Repairs - list major repairs below	
Rent Paid		Taxes - Real Estate	
Meals and Entertainment		Management Fees	
Miscellaneous (> 500, list out)		Miscellaneous	
Supplies		Supplies	
Equipment Rental		Water and Sewer	
Travel		Rubbish Removal	
Office Expense		Office Expense	
Utilities		Utilities	
Purchases -			
Subcontractors		Mileage used for Rental - report below	
Salaries and Wages Paid			
Taxes - Label type		Improvements - provide breakdown	
<input type="checkbox"/> List amount contributed to or going to contribute to SEP, SIMPLE, or other qualified retirement plan.		<input type="checkbox"/> List Improvements, Furniture, Carpet, and Major Repairs separately with date and cost of each item.	
<input type="checkbox"/> Do you have an area in your home used regularly or exclusively for Business? Office at your business location? <input type="checkbox"/>		<input type="checkbox"/> If the property was purchased or converted to rental use this year, provide purchase settlement statement.	
<input type="checkbox"/> List Equipment, Furniture & Fixtures, Leasehold Improvements, and Major Repairs separately with date and cost of each item. Incl. receipts or contracts.		<input type="checkbox"/> You do not need to include actual receipts.	
<input type="checkbox"/> Provide us with amount of End of Year Inventory at 12/31/23 on hand - at cost \$ _____.			
<input type="checkbox"/> Provide us with financing information on any New Business Loans, Vehicle Loans or Lines of Credit , and interest paid in 2023.			
<input type="checkbox"/> Amt. of Self-Employed Health Insurance Premiums paid by you \$ _____, list amount paid for employees separately.			
<input type="checkbox"/> Business Vehicle Information:		Vehicle 1	Vehicle 2
Description of Vehicle (Make/Model)			
Date vehicle was placed in service			
Total miles driven in 2023 (business and personal together)			
Business miles -January 1, 2023 thru December 31, 2023			
Personal - Miles - Another vehicle available for psl. use?			
Automobile Expenses - Gas etc. w/o Loan Pmt.			
Lease -Total monthly payments paid in 2023			
Own -Interest paid on Vehicle Loan in 2023			