

Documents Needed for 2023 Tax Preparation – Individual Returns

- Income documents
 - Latest wage statement
 - W-2s
 - 1099 MISC/1099 NEC – commissions, small business income
 - SSA-1099 – Social Security
 - RRB-1099 – Railroad retirement
 - 1099R - Pension, retirement
 - 1099B – Sales of securities
 - 1099-Int/1099-OID – Interest
 - 1099-Div – Dividends
 - 1099 K- Receipts from online platform
 - 1099G – unemployment, state tax refund
 - 1099C – Cancelled Debt
 - W2 G – Gambling/Lottery winnings
 - Alimony Received/Paid including ex-spouse SSN & **Date of Divorce**
 - Scholarships/fellowship
 - Prizes, awards, jury duty, other
 - Schedule K1
 - Investment documents – sale or purchase
 - Real Estate closing statements
 - 5498 IRA/401K Contributions
 - Retirement plan contributions
 - Sale/purchase documents from any asset, including business
 - Foreign assets holdings and income
 - Digital assets holding and transactions
- New Clients:**

 - Driver’s License
 - Social Security Card/IP Pin Documents
 - Dependent(s) social security card
 - Dependent(s) date of birth
 - Previous 2 years’ tax returns
 - Voided check for direct deposit of refund
- Expense documents
 - Medical & dental
 - Real estate and personal property taxes
 - Large items subject to sales tax – vehicle, boat, remodel, etc.
 - Local or state income taxes
 - Estimated federal taxes
 - 1098 – Mortgage/HELOC interest
 - Mortgage closing statement
 - Charitable contribution receipts
 - K – 12 educator expenses
 - 1098T – tuition & education expenses, books and other education fees
 - 1098E – Student loan interest
 - Casualty loss or theft –**Hurricane Ian & Idalia**
 - Energy Efficient Vehicle and Home Improvement
 - Adoption of a child costs
 - Gambling losses
 - Dependent care provider information
 - Health Care documents
 - 1095 – all types
 - HSA contribution and distribution
 - Long Term Care
 - Life cycle changes – including but not limited to
 - Birth/Death/Divorce
 - Employment/Retirement/Relocation
 - Inheritance/Bankruptcy
 - Children aging out of credits/college/empty nest
 - Correspondence
 - IRS Letters & Notices
 - State Letters & Notices
 - Licensure changes
 - Identity protection PIN letter

Please upload all tax documents to your online portal or drop off or mail in your documents to the AvantiPRO office