

2023 Personal Tax

BASIC CHECKLIST

- Personal Information
- Dependent Information
- W-2(s), 1099(s), K-1(s)
- Home Ownership Expenses
- Charitable Donations
- Childcare Expense Documentation
- Educational Expenses (Form 1098-T)
- Student Loan Interest (1098-E)
- K-12 Educator Expenses
- Retirement Contributions

NOTES
