

Hi everyone,  
It's that time of year, Income Tax Prep time.

I have attached some Excel tax spreadsheets that will help you gather your income and expenses into categories for when you have your income taxes prepared.

**HOW TO USE THEM:** Download and Save each spreadsheet to your computer. These will be your "Master Copies".

Next, open up one of them. Look near the upper / center of the excel, and click the yellow tab, **ENABLE EDITING**.

Then, "Save As" the file under a New File Name. If you are using the "1040 Personal" check list, you might Save As, example, **"Jan Doe 2023 Personal Taxes", or "Jane Doe – XYZ Company" (the name of the Small Business you own"**. Now you can input your income and expense items.

The spreadsheets might not encompass ALL items you need, so for those expense items that are not on the spreadsheet, just keep list those in an email to me, so I make sure to enter those on the tax return.

**Personal 1040 Tax Check List:** This is for the income and expenses of most people. Your W-2 wages; Interest from banks; Stock sales; College Tuition and fees; and Home Mortgage Interest etc.

**RENTAL PROPERTY OWNERS:** **Important!** Please "Save As" a separate file for EACH rental unit. Example: **"4281 Somewhere Lane Rental – 2023 Tax Year"**  
That is very important that we track the Income and Expenses for each unit separately.

**NOTE:** If you are a repeat current client and nothing has changed, you do not need to submit a Personal Income & Expense to me every year. Examples of changes that I need to know about. (Birth of a new baby, Dependents added to or removed from this year tax return, moved to a new address, divorced, or married during this tax year, new email address or phone number, etc.).

**\*\*\* If you know of someone looking for a Tax Professional, referrals are appreciated.**