

2023 Tax Prep Checklist

DEDUCTIONS & CREDITS

***If divorced, you must provide proof (divorce decree) that you have the right to claim child or receive spousal support for 2023 tax year.

INCOME	
W-2	
Social Security 1099-SA	
Dividends 1099-DIV	
Interest 1099-INT	
Stock Trades 1099-B	
Pension/IRA/Retirement Distributions/1099-R	
K-1 Business	
K-1 Trust/Estates	
Unemployment Comp 1099-G	
Cancellation of Debt 1099-C	
Gambling 1099-G	
Foreign Income (include interest)	
Rental Income (see worksheet) – Schedule E	
1099-MISC	
1099-NEC	
Sale of Home/Property 1099-S	
Other income (property sales, sale of business assets, other)	
Basis for stock options or RSUs	
Crypto or virtual currency sales	
Online trading accounts like Robinhood, Webull, Coinbase Need 1099-B (you will have to log into your account for these)	
Self employment income (see worksheet)- Schedule C	

DEDUCTIONS	
Traditional IRA Contributions	
Roth IRA Contributions	
SEP IRA Contributions	
401K Owner Contr. (Self Employed)	
Simple IRA Contributions	
Alimony Paid	
Health Savings Acct contrib & distributions(5498/1099)	
Charitable Donations (Cash/Noncash) *SEE BELOW	
Mortgage INT , refi (include stmt)	
2 nd Mortgage INT	
Real Estate Taxes Paid	
Vehicle Taxes Paid	
Medical, Dr, Dentist, Eye, Hospital, RX	
Medical Mileage	
Health Ins Paid (outside of employer) 1098 A/B or C inc.	
Long term care insurance	
Child Care (need stmts w/EIN, names, and amounts)	
TAX CREDITS - AZ	
Public Schools	
Private Schools	
Working Poor	
Foster Child	
Military	
529 plan contribution	

EXPENSES	
1098-E Student Loan Statement	
Educator Expenses – Max \$250	
1099-T Tuition, room, board, tech fees, etc.(need print out from school)	
Sales tax purchases on large purchases (car, boat, home remodel)	
Casualty & Loss not covered by insurance	
Gambling losses up to amount of winnings (include print out from casino)	
Moving Expenses (for military only)	
Alternative Vehicle (new only)	
Energy Credit (solar purchase only, new AC, new water heater, windows)	
Non reimbursed partnership expenses	
Odometer reading for business income	
OTHER	
Alimony/Spousal Support (***)	
Royalties	
State tax refund 1099-G	
529 plan distribution 1099-Q	

*If you donated more than \$500 in goods, we must have details (item purchase date, value, to whom donated)

Deadline for Documents 3/15/24

For on time processing. Extensions charged \$25

What to do next?

- Complete tax info sheet and include with documents
- Option 1. Drop docs off at: 12439 N. 32nd St. Phoenix, AZ 85032 or home office: 5521 E. Calle Del Sol, Cave Creek, AZ 85331
- Option 2. Upload docs to www.secureportal.com (must be uploaded as PDF file and on one scan preferred)
- Option 3. Mail documents to home office: 5521 E. Calle Del Sol, Cave Creek, AZ 85331
- If you have several tax questions, please schedule a call or in-person appointment with Joell.
- ❖ Please note, we do not require original documents. Copies of the originals are acceptable. The most important part is providing the information, as we will not start your tax return until ALL documents are received.