

Information Needed For 2023 Tax Return

- Copies of Drivers Licenses or Photo ID Cards (for new clients only). Originals or copies of social security cards and dates of birth for taxpayer, spouse, and dependents (new clients & new dependents only).
- Prior year returns - at least 1 year (new clients only)
- W-2 & 1099 forms (wages, unemployment compensation 1099-G, interest 1099-INT, dividends 1099-DIV, etc.)
- Pension, Annuity, Social Security & IRA Information:
 - ◇ 1099 forms (1099-R for Pensions; SSA-1099 for Social Security; RRB -1099 for Railroad retirement income)
 - ◇ IRA contributions and conversions (Traditional and/or Roth)
 - ◇ Keogh, SEP or SIMPLE contributions
- Capital Gain Information:
 - ◇ 1099-B forms for sale of securities through a brokerage
 - ◇ Basis and date of purchase for securities on 1099-B forms
 - ◇ Relevant documentation for any other property sold
 - ◇ Sales any collectible items
- Homeowner Information:
 - ◇ Closing statement for home sold during 2023
 - ◇ 1099-S form (proceeds from sale of house)
 - ◇ Closing statement for home purchased during 2023
 - ◇ Refinancing statement, if any
 - ◇ 1098 forms from banks, mortgage companies, etc. (interest paid on mortgage)
 - ◇ Real Estate taxes paid.
- Other Income Information:
 - ◇ Royalty, Partnership, Trust or S-Corp. income (K-1 forms)
 - ◇ W-2G for gambling winnings; related losses
 - ◇ State & local income tax refunds (1099-G forms)
 - ◇ Alimony received along with social security number and name of payer
 - ◇ Unemployment income forms (1099-G)
- Business Income & Expenses:
 - ◇ 1099-MISC Forms, 1099-NEC Forms, 1099-K Forms
 - ◇ Advertising
 - ◇ Cell phone, telephone, internet
 - ◇ Computers, fax machines, printers, copiers
 - ◇ Contract labor
 - ◇ Insurance: liability & professional premiums,
 - ◇ Meals
 - ◇ Mileage (total miles driven and business miles number or % related to business)

- ◇ Office supplies, postage
- ◇ Taxes paid, licenses & permits
- ◇ Professional fees
- ◇ Rent or in-home office expenses (see deduction information below for details)
- ◇ Repairs & maintenance
- ◇ Trade show costs
- ◇ Travel, tolls, lodging, parking
- ◇ Dues & subscriptions
- ◇ Other direct operating expenses

Rental income & expenses:

- ◇ Rent collected
- ◇ Advertising
- ◇ Travel & mileage to inspect/maintain property
- ◇ Commissions, management fees
- ◇ Insurance
- ◇ Association dues, permits
- ◇ Mortgage interest
- ◇ Office supplies, postage
- ◇ Repairs
- ◇ Pest Control, lawn care, pool maintenance
- ◇ Supplies
- ◇ Property taxes, tangible taxes, local licensing fees
- ◇ Utilities
- ◇ Appliances & other major asset purchases

Dependent information:

- ◇ Name, date of birth, social security number (original or copy of social security card for new dependents)
- ◇ Names, Tax ID's, and addresses of dependent care providers, amounts paid for each dependent
- ◇ Income of dependents, if substantial
- ◇ Documentation relevant to custody of children of divorced parents
- ◇ Proof that children lived with you (medical or school record showing child's name and your address)

Deductions & other tax information:

- ◇ Major medical expenses, health insurance and LTC (nursing home insurance)
 - Health Insurance Marketplace Statement (form 1095-A)
- ◇ Alimony paid along with social security number and name of payee
- ◇ Margin interest
- ◇ Casualty losses, including insurance settlement information
- ◇ State and local taxes
- ◇ Real estate taxes paid
- ◇ Sales tax paid for major home improvements
- ◇ Purchase or lease agreement for new vehicle, boat or RV
- ◇ Receipts for purchase of home building materials
- ◇ Charitable contributions w/name of organization, date of contribution and value amount, type of donation (goods or cash)
- ◇ Student loan interest paid (form 1098-E)
- ◇ Tuition paid for any family member attending college (form 1098-T, 1099-Q), receipts for books & fees
 - Has any credit been taken before? For how many years?

- ◇ Purchase receipts related to certain solar power systems (eligible for energy – related credits)
- ◇ Purchase receipts related to Plug-In Electric Vehicles (eligible for Plug-In Electric Drive Motor Vehicle credit)
- ◇ In home office deduction
 - Total sq ft of house, total sq ft of room(s) used for office
 - Rent amount if not owned by the taxpayer
 - Purchase price and date of purchase
 - Mortgage interest & property taxes
 - Homeowner’s insurance & HOA fees if any
 - Furnishings, equipment, wall hangings, carpet
 - Utility bills: electricity, telephone, water, gas, cable, trash, internet
 - Repairs & maintenance such as pest control, lawn care
- Amounts and dates of estimated payments paid to IRS for the year
- Any payments to IRS for prior years or as a result of audit resolutions
- Current IRS installment agreement.
- Voided check, if direct deposit of your refund is desired

Peck Jenkins Kershner CPAs PA’s 2023 Questionnaire – Ask us or follow this link to the questionnaire on our website:
<http://www.pjkcpa.com/forms>