

2023

TAX PREP CHECKLIST

Mini-tax checklist for individuals

As the year-end nears, the following is a mini-checklist of tax forms you may receive in the mail starting January.

- Form (s) W-2 - wages
- Form (s) 1099 INT & 1099-DIV - Interest & Dividends
- Form (s) 1099-B - Brokerage statements from stock, bond or other investment transactions
- Form (s) 1099-G (refunds of state taxes, unemployment compensation, etc.)
- Form (s) 1099-K (Merchant Card and Third Party Network Payments)
- Form (s) 1099-R - Distributions from Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs
- Form (s) 1099-MISC & 1099-NEC - Misc. & Nonemployment compensation
- Form (s) 1099-SSA Social Security Income
- Schedule (s) K1 - investments, partnerships, S-Corps, or trusts and estates
- Form (s) 1098 - Mortgage interest and property tax statements
- Form (s) 1098-E Student Loan Interest Paid
- Form (s) 1099-T Tuition Statement
- Form (s) 1095 A, 1095-B, and/or 1095-C Healthcare Statements from an exchange
- Form (s) 1099-A & 5498-SA from your Health Savings Account
- Closing statements from the sale or purchase of a home or rental property
- Charitable Contributions Donor Statements
- 529 Contribution Receipts
- All Other supporting documents (childcare statements, etc)
- Any tax notices received from the IRS and/or State
- Quarterly tax payments made to the IRS and/or State, including amounts and dates paid



Important: We suggest that you take note of all the financial institutions where you have cash and/or investments. Not all of these companies will mail you the year-end tax forms – 1099-INT, 1099-DIV or 1099-B. You will need to download these forms from their websites.



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Schedule a complimentary 20-minute call today.

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