



2023 Tax Appointment Checklist

We look forward to serving you this year! Please bring the following supporting documents to ensure your appointment is as thorough and efficient as possible. This checklist is not exhaustive of all source documents that may be required to handle your specific tax situation!

Income Statements

- W2's and 1099 Forms
- Bank Interest & Dividend Earnings
- Amount of Prior Year State Refund/Payment
- Pension/IRA Distributions
- Gambling Win/Loss Statements
- Unemployment Compensation
- Social Security Statement
- Stock Transaction Reporting
- Sales of Home/Real Estate
- Native American Indiv. Income Statement

Expense Statements

- Out of Pocket Medical Costs
- Sales Tax on Large Purchases
- Vehicle Reg. Fees
- Real Estate Taxes Paid
- Mortgage Interest
- Charitable Donations
- Post Secondary Tuition Expenses
- Student Loan Interest
- Childcare Expenses
- Adoption Fees
- Alimony Paid
- IRA/Retirement Plan Contributions
- AZ State Schools Tax Credit Program

Rental Property Data

- Rental Income
- Mortgage Interest
- Real Estate Taxes
- Renovation and Repairs
- Management Fees
- HOA Fees
- Insurance Costs
- Sales of Property 1099S

Earned Income Credit (EIC)

- Birth Certificate
- Paperwork showing Guardianship
- Proof of Residency

Residency of Qualifying Children

- School Records or Statement
- Placement Agency Statement
- Landlord Statement
- Medical Records

Self- Employment Data

- Business Income
- Expenses By Category
- Vehicle Mileage
- Payroll Taxes
- New Asset Documents
- Sub-Contractor Payments