



TAX PREPARATION CHECKLIST FOR 2023

TAXPAYER'S NAME: _____

SPOUSE'S NAME: _____

Please make sure to answer these questions BEFORE your appointment and bring this (and any supporting documents) to your appointment. If you are unsure about any of these questions, please ask us!

2023 CHANGES

YES NO

Grid for question 1: YES NO

1. If you are due a refund, would you like it direct deposited into your bank account?

Bank Name: _____

Routing Number: _____

Account Number: _____

Is it a savings account? Yes No

Grid for question 2: YES NO

2. If you have a balance due, would you like it electronically withdrawn from your bank account?

Grid for question 3: YES NO

3. Were you legally married as of December 31, 2023?

Grid for question 4: YES NO

4. Are you considered unmarried and provide more than 50% of support for a child or dependent who lived with you over half the year?

If so, please list name(s), SSN(s), and DOB(s) of child(ren) or dependent(s) you are claiming for 2023: _____

Grid for question 5: YES NO

5. Are there changes to who you may claim as dependents for 2023? (If yes, please attach proof of residency or Form 8332)

Grid for question 6: YES NO

6. Did you purchase your health insurance coverage from the ACA Marketplace? (If yes, please attach form 1095-A)

Grid for question 7: YES NO

7. Did you move, purchase, sell, or refinance during 2023? (If yes, please attach Home Sale/Closing Information)

Grid for question 8: YES NO

8. Did you earn income in a state other than the state you live in?

Grid for question 9: YES NO

9. Did you receive any notices from the IRS or the state taxing agency? (If yes, please attach)

Grid for question 10: YES NO

10. Did you receive any type of prize, award, or gambling winnings?

Grid for question 11: YES NO

11. Did you receive jury duty or alimony pay?

Grid for question 12: YES NO

12. Did you receive, sell, send, exchange, or acquire any financial interest in any digital assets?

Grid for question 13: YES NO

13. Did you make any gifts to any one person in 2023 more than \$17,000?

Grid for question 14: YES NO

14. Did you pay wages to any household employees (such as a nanny)?

Grid for question 15: YES NO

15. Did you have any debts forgiven or cancelled in 2023?

Grid for question 16: YES NO

16. Did you pay any college tuition during 2023? (If yes, please attach form 1098-T)

How much was paid for any out-of-pocket expenses (books, fees, etc.)? \$ _____

Grid for question 17: YES NO

17. Did you pay any private school tuition cost for Grades K -12? (If yes, please attach documentation from the school)

Grid for question 18: YES NO

18. Did you pay any student loan interest? (If yes, please attach 1098-E)

Grid for question 19: YES NO

19. Do you have any home equity loans where any proceeds were not used to improve your residence?

Grid for question 20: YES NO

20. Did you have any foreign assets during the year?

Grid for question 21: YES NO

21. Did you make any purchases in 2023 from out-of-state companies that did not charge sales tax?

If yes, please provide the amount of purchases subject to your state's Use Tax: \$ _____

Grid for question 22: YES NO

22. Are you expecting any significant changes to 2024's income, deductions, or credits?

Grid for question 23: YES NO

23. Did you make any contributions/deductions to an HSA? (If yes, please attach Form 1099-SA or Form 8889)

Grid for question 24: YES NO

24. Do you have an identity protection PIN used to file your return due to identity theft? (If yes, please attach documentation)

Grid for question 25: YES NO

25. Did you make any federal or state estimated tax payments? (If yes, please attach documentation)

Grid for question 26: YES NO

26. Did you make improvements to your home that may qualify for Energy credits? (If yes, please attach documentation)

Grid for question 27: YES NO

27. Did you make any contributions to a retirement plan? (If yes, please attach documentation)

Grid for question 28: YES NO

28. Did you pay any rent for housing? \$ _____ Was heat included? Yes No

Grid for question 29: YES NO

29. Did you make any contributions/deductions to any college savings plan? (If yes, please attach documentation)

Grid for question 30: YES NO

30. Did you pay for any health insurance premiums out-of-pocket? \$ _____

BUSINESS AND RENTAL QUESTIONS *(skip this section if not applicable)*

YES NO

1. Did you start a new business or purchase any rental property during 2022?
2. Did you purchase (or begin using) any assets for your business?
3. Did you sell (or stop using) any assets for your business?
4. Did you make any business payments that require you to issue 1099s? *(Not needed for rentals)*
5. If yes, have you filed all 1099s?
6. Do you have all the documentation to support all business expenses? *(If yes, please attach Schedule C)*
7. Do you have all the documentation to support all rental expenses? *(If yes, please attach Schedule E)*
8. Did you spend 250 or more hours of rental service activity? *(If yes, please attach log)*
9. Do you have a log for business mileage? *(If yes, please attach log)*
10. Are any of your Rentals, Businesses, and/or Farms registered as an LLC? *(If yes, please attach which ones)*

CHECK YOUR PREFERRED METHOD FOR SIGNING YOUR TAX RETURN

- Sign Electronically
- Sign in the Janesville Office
- Sign in the Evansville Office

CHECK YOUR PREFERRED METHOD FOR TAX RETURN DELIVERY

- Mail
- Portal Upload via SecureFilePro
- Paper Copy at Janesville Office
- Paper Copy at Evansville Office

If signing electronically, please provide your e-mail address(es).

TAXPAYER E-MAIL: _____

SPOUSE E-MAIL: _____

DRIVER'S LICENSE INFORMATION

TAXPAYER: DOB: _____ LICENSE #: _____
 STATE: _____ ISSUE DATE: _____ EXP. DATE: _____

SPOUSE: DOB: _____ LICENSE #: _____
 STATE: _____ ISSUE DATE: _____ EXP. DATE: _____

By signing below, I certify all information provided on and in connection with this form is true and correct to the best of my knowledge. If any information provided is incomplete, inaccurate, misleading, or false, I may be subject to tax filing delays, tax audits, or legal action.

TAXPAYER SIGNATURE: _____ **DATE:** _____

SPOUSE SIGNATURE: _____ **DATE:** _____