

1040 CLIENT CHECKLIST

GENERAL INFORMATION *(only complete if new info or changes)*

	Taxpayer	Spouse	
Name			
Address			
City, State, Zip			
Phone #			
Email address			
County of Residence			
County of Employment			
Social Security #			
Date of Birth			
Occupation			
Dependent(s) name			
Date of Birth			
Social Security #			

TAX FORMS *(provide forms; do not write amounts on this list)*

<u>INCLUDED</u>	<u>N/A</u>	<u>WILL PROVIDE</u>
↓	↓	↓

INCLUDED	N/A	WILL PROVIDE	
			W-2s (wages)
			1099-INT (interest income)
			1099-DIV (dividend income)
			1099-B (stock/security sales)
			SSA-1099 (Social Security/disability income)
			1099-R (retirement income)
			1099-NEC (nonemployee compensation)
			1099-MISC (miscellaneous income)
			W-2G (gambling income)
			1099-G (unemployment, government & agricultural program payments)
			K-1 (S corp/partnership/fiduciary pass-through income)
			1099-C (foreclosure/cancelled debt)
			1099-S (proceeds from sale of real estate)
			1099-K (payment card and third party network transactions)
			1099-SA (HSA distributions)
			1099-Q (education/529 plan distributions)
			1098 (mortgage interest statement)
			1098-E (student loan interest)
			5498-SA (HSA contributions)
			5498 (IRA contributions/FMV)
			1098-T (tuition paid)
			1095-A (marketplace insurance premiums/APTC)

1040 CLIENT CHECKLIST (cont'd)

Did you make all Federal Estimated Income Tax Payments? Please include verification

Date due	April 18, 2023	June 15, 2023	September 15, 2023	January 16, 2024
Date paid				
Amount				

Did you make all State Estimated Income Tax Payments? Please include verification

Date due	April 18, 2023	June 15, 2023	September 15, 2023	January 16, 2024
Date paid				
Amount				

DEDUCTIONS & CREDITS

Indiana College Choice contributions (**provide account #, owner, and beneficiary**)

Designated for higher education
 Designated for K-12 tuition

Rent paid for Indiana residence Provide months rented
 Provide landlord name and address

Energy improvement costs (**provide item purchased, amount, & date**)

Donations to an Indiana college (**provide date, amount, college name**)
 Charitable contributions - noncash (used items in good or better condition)
 Charitable contributions - cash, check, credit card
 Charitable mileage
 QCD (donations directly from your IRA to charity)

***Supporting documentation is required for QCD; Form 1099-R DOES NOT indicate what amount went to charity.**

**Cash and non-cash donations greater than \$250 require a written contemporaneous acknowledgment from the donee organization.*

Health insurance premiums (**excluding Medicare and pre-tax employer deductions**)
 Medical expenses Nursing home costs
 Prescription costs Medical mileage
 Long-term care premiums for taxpayer Indiana Partnership LTC premiums?
 Long-term care premiums for spouse Indiana Partnership LTC premiums?

Real estate taxes Private/home school expense
 Auto excise taxes Child care expense
 Sales tax on major purchase Educator expenses
 Gambling losses

Roth IRA contributions - Taxpayer
 Roth IRA contributions - Spouse
 Traditional IRA contributions - Taxpayer
 Traditional IRA contributions - Spouse

Please answer the following questions marking yes or no. ***For all yes answers please provide us with all pertinent information regarding that transaction.*** All questions pertain to the current tax year.

	<u>YES</u>	<u>NO</u>
Give gifts to any individual of more than \$17,000?		
Noncustodial parent claiming your child (include signed Form 8332)?		
Buy, sell, or exercise stock options?		
Sell or trade-in a vehicle that has been used for business?		
Purchase a new or used "clean energy" vehicle?		