

# Drop Off/Mail In Checklist

Name:

E-mail address:

Phone Number -

Direct Deposit Info - Name of Bank/Last 4 of Routing & Account Numbers

Did you collect Unemployment? Is the 1099-G included?

You must download and print the 1099G from the State Dept of Labor website, this form is not mailed to you.

Dependent Children Information

Claiming the same dependents as last year? Any new dependents?

College Cost Information

Any dependents in college? Provide Form 1098-T and the amount spent on books

Medical Expenses/Health Insurance

Prescriptions, doctors, glasses, contacts, chiropractors, dentists, hearing aides, & medical miles

Copy of Form 1095. If your insurance is on the Marketplace it will be Form 1095A, otherwise it is 1095B or 1095C.

Was everyone on the return covered by insurance all 12 months? If not, what months and who was not covered?

Residential Energy Credits

Amount spent on New Energy Efficient Property. Each improvement is listed separately.

Windows	Doors	A/C & Furnace	Water heater	Insulation
\$	\$	\$	\$	\$

Did you make estimated tax payments in 2023? Include the dates of your payment & amounts separately.

Do you have a financial interest or signature authority on a non-US bank or financial account? YES or NO

In 2023 did you receive or sell, exchange, gift, or dispose of a digital asset/cryptocurrency? YES or NO

Final 2023 paystub

Copy of Taxpayer and Spouse Driver's Licenses (if renewed in 2023 or 2024)

529 Plans

Please provide copy of year-end statement. Many States allow a deduction or credit for contributions made.

Contributions can potentially be deducted regardless of relationship to the beneficiary of the plan.